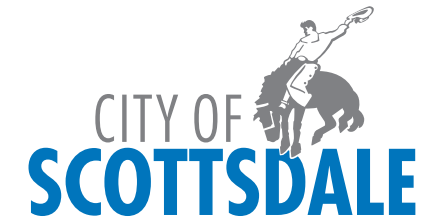




Travel USA Visitor Profile



2020

Key Findings

- There were an estimated 7.3 million domestic overnight and day visitation to Scottsdale in 2020, a decline of 21.2% from 2019. Those trips lead to \$1.1 billion in domestic visitor expenditures, down 36%.
- Looking at overnight trips, there were an estimated 3.4 million trips (a decline of 28.3%, or 1.3 million trips) and \$863 million in overnight expenditures (a decline of 39.3%, or \$558 million). Expenditures dropped more than trips because the average per person per trip spend of \$257 is down \$46 from 2019, tied mostly to drops in lodging and restaurant, food, and beverage spending.
- Turning to day trips, there were as estimated 3.9 million day trips (a decrease of 13.9%, or 600,000 trips) and \$263 million in day expenditures (a decrease of 22.2%, or \$75 million). Similar to the overnight sample, expenditures dropped more than trips because the average per person per trip spend of \$66 is down \$7 from 2019, tied mostly to drops in restaurant, food, and beverage and recreation/entertainment spending.
- For overnight visitation, Q2 2020 was down 9 points from 2019 to 16%, while Q1 and Q4 were strong, gaining 6 points and 4 points respectively.
- Q4 was the strongest day quarter, representing 33% of all trips, up 10 points from 2019. Q1 and Q2 lost share.
- Over half – 58% – report they drove their own car or truck to get to the destination on their overnight trip to Scottsdale. Only 42% used their own car or truck as their primary transportation in 2019.
- In 2020, the following definition was added to resort - a type of hotel typically located outside of city centers which offers outdoor opportunities such as the beach, tennis, golf, skiing, or hiking in addition to on-site amenities such as spas, pools, shopping, etc. Primarily for this reason, hotel share rose 13 points to 36% and resort hotel fell 11 points to 18%.
- For both overnight and day trips, business meetings are in the top 10. As remote work dominated 2020, more travelers on vacation attended Zoom and other video conference meetings, and more people not on PTO went on trips and attended required meetings as necessary. As many jobs remain remote in 2021, we expect this overlap of work and leisure travel to continue for the near-term.
- There was a younger shift in the overnight visitor sample – the 18 – 34 age brackets increased 16 points to 39%, while 55+ decreased 16 points to 27%. This age swing made for a more diverse visitation, as well as more families with minor children.
- For the day sample, there was a less pronounced younger age shift with few other demographic implications. The 25 – 44 age brackets increased 19 points to 45%, and the 45 – 64 age brackets decreased 17 points to 31%.

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- It is currently the largest ongoing study conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- An **overnight trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- A **day trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- This report provides an overview for Scottsdale’s domestic tourism business in 2020.

Methodology

Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Scottsdale, the following sample was achieved in 2020:



Overnight Base Size

1,091

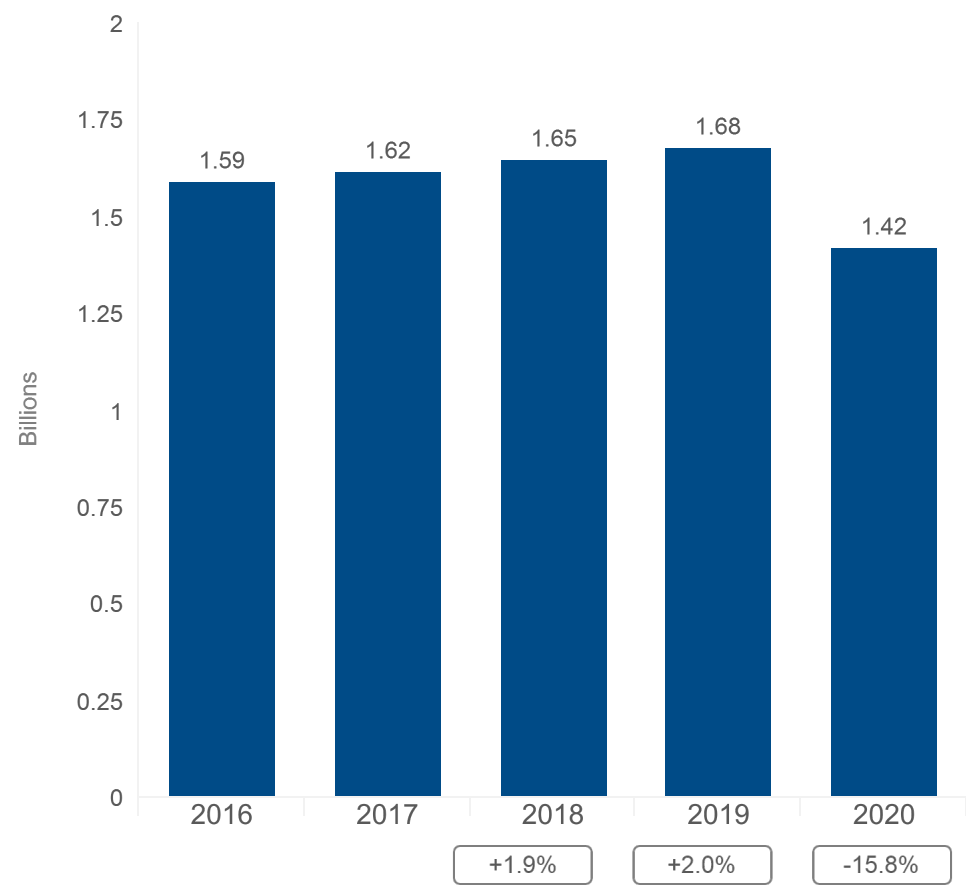


Day Base Size

275

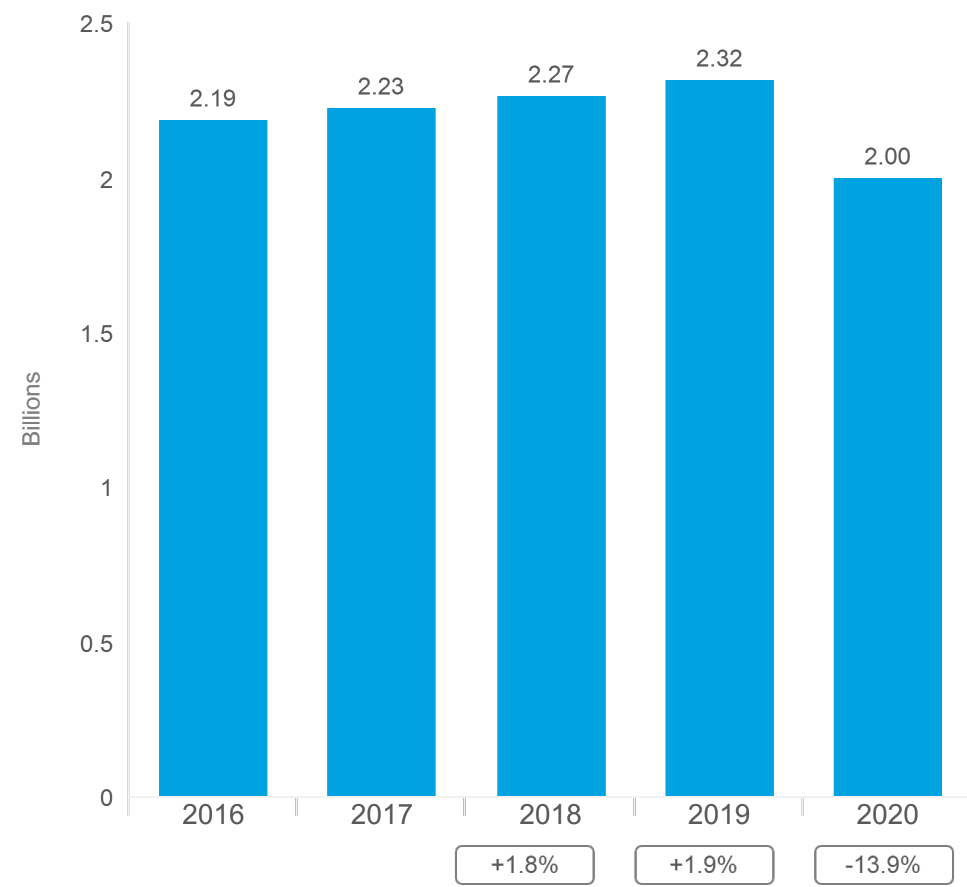
For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Total Size of U.S. Overnight Travel Market



*West Region: Down 13.6% from 2019

Total Size of U.S. Day Travel Market



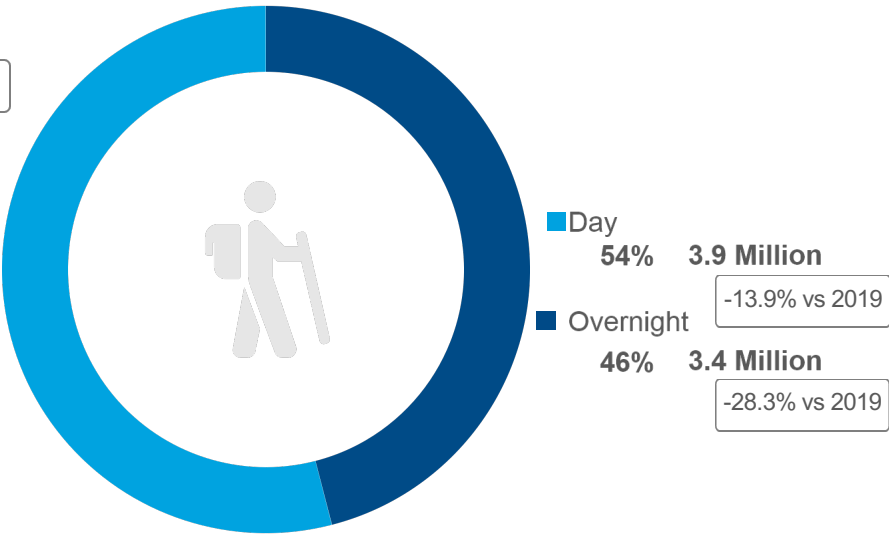
*West Region: Down 10.0% from 2019

Total Size of Scottsdale 2020 Domestic Travel Market

Total Person-Trips

7.3 Million

-21.2% vs. last year

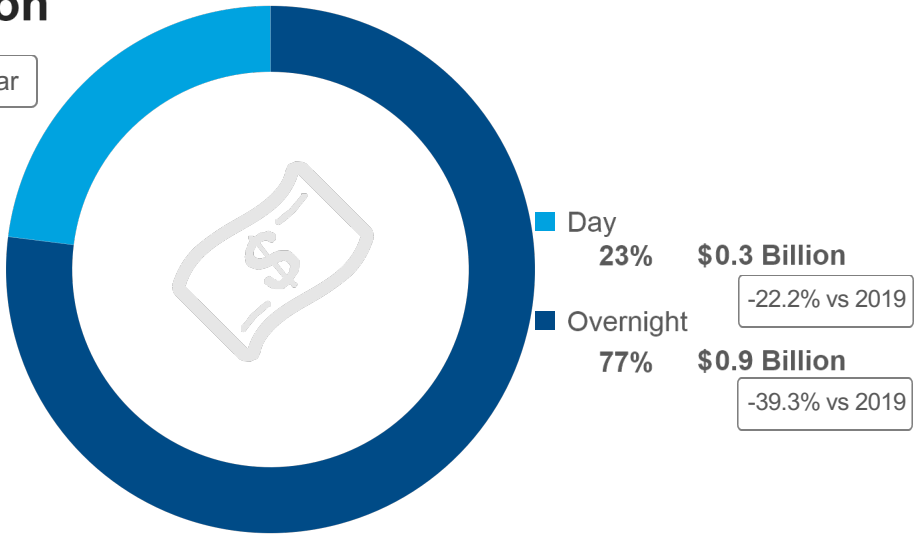


Total Expenditures for Scottsdale 2020 Domestic Travel Market

Total Spending

\$ 1.1 Billion

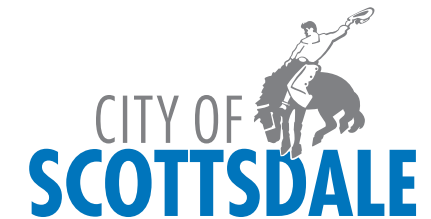
-36.0% vs. last year





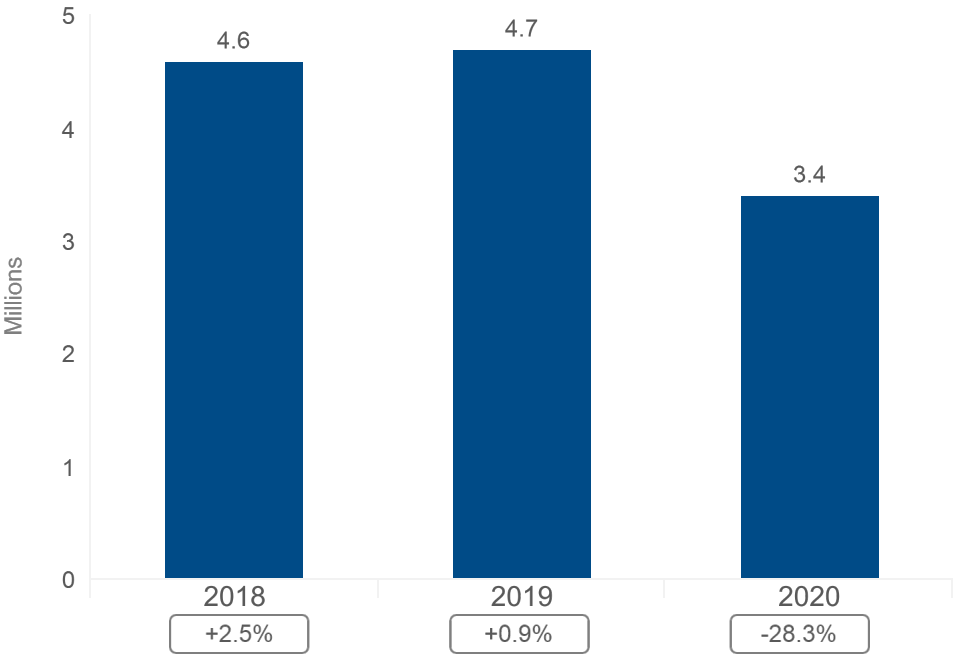
Travel USA Visitor Profile

Overnight Visitation



2020

Overnight Trips to Scottsdale



Past Visitation to Scottsdale

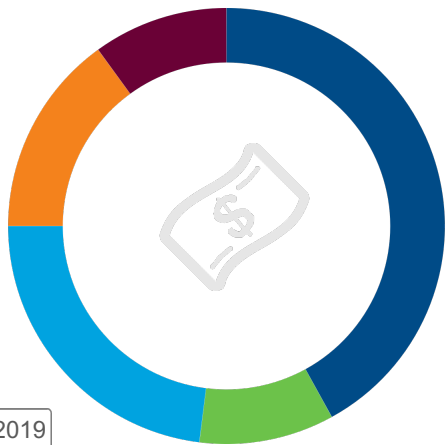
78% of overnight travelers to Scottsdale are repeat visitors

59% of overnight travelers to Scottsdale had visited before in the past 12 months

Domestic Overnight Expenditures - by Sector

Total Spending
\$ 0.863 Billion

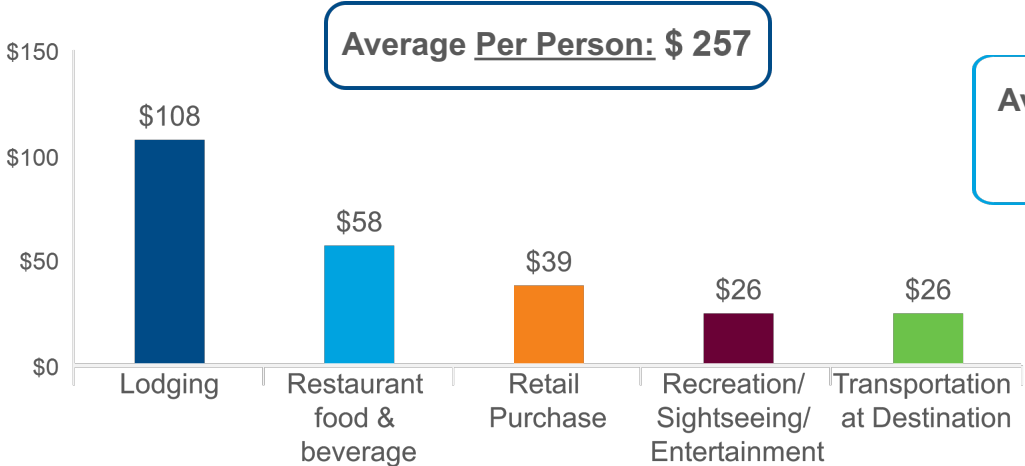
-39.3% vs. last year



- Lodging -38.3% v. 2019
42% \$362 Million
- Transportation at Destination -21.1% v. 2019
10% \$86 Million
- Restaurant Food & Beverage -49.8% v. 2019
23% \$197 Million
- Retail Purchase -26.9% v. 2019
15% \$130 Million
- Recreation/Entertainment -42.9% v. 2019
10% \$88 Million



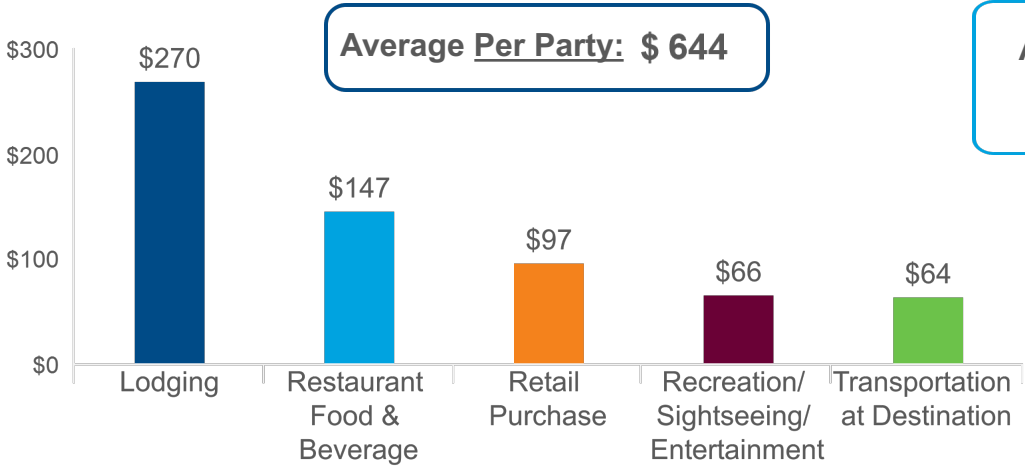
Average Per Person Expenditures on Domestic Overnight Trips - by Sector



Average Per Person: \$ 257

Average Per Person:
Leisure \$222

Average Per Party Expenditures on Domestic Overnight Trips - by Sector



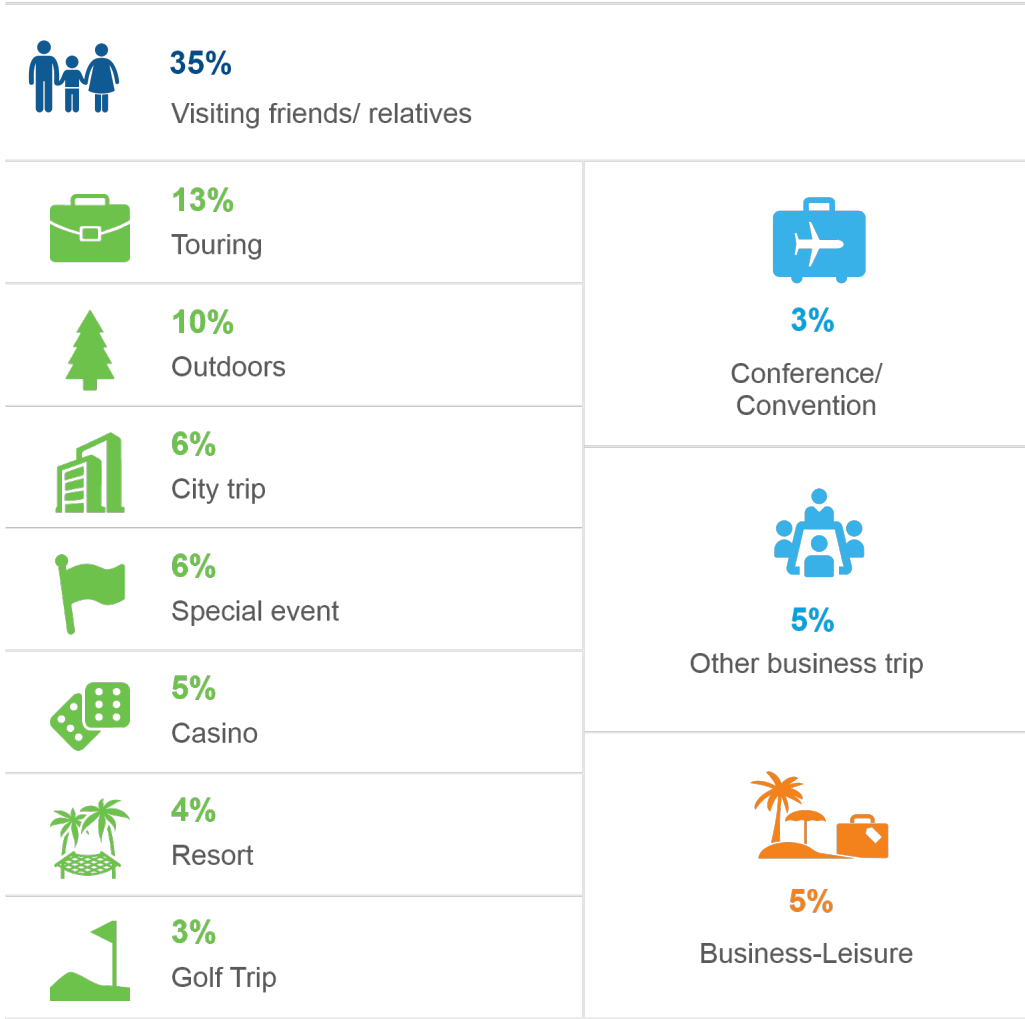
Average Per Party: \$ 644

Average Per Party:
Leisure \$578

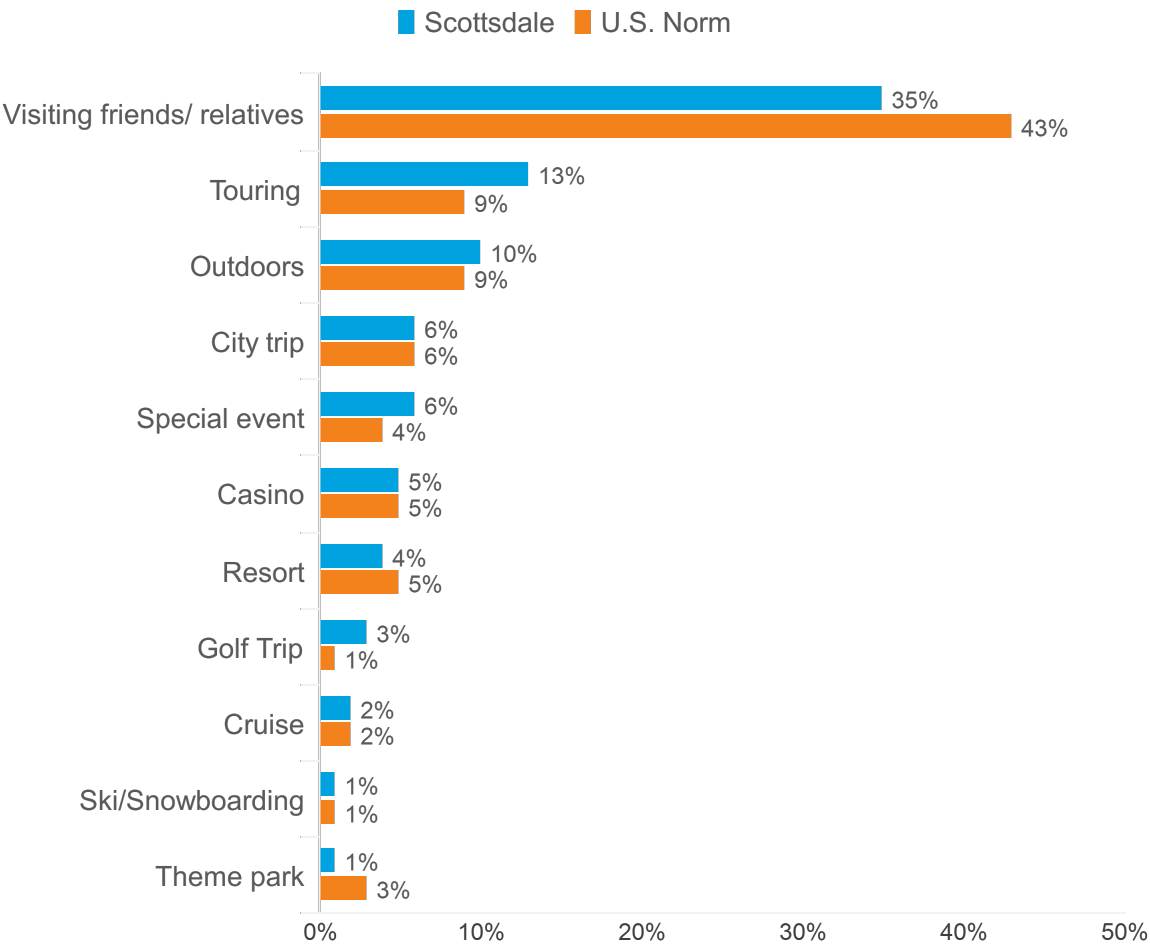
Scottsdale's Overnight Trip Characteristics

Base: 2020 Overnight Person-Trips

Main Purpose of Trip



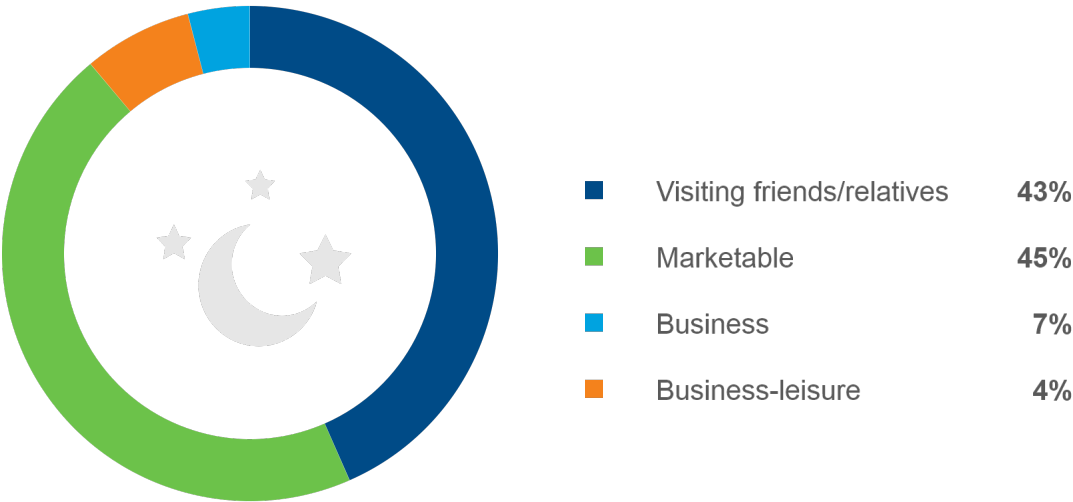
Main Purpose of Leisure Trip



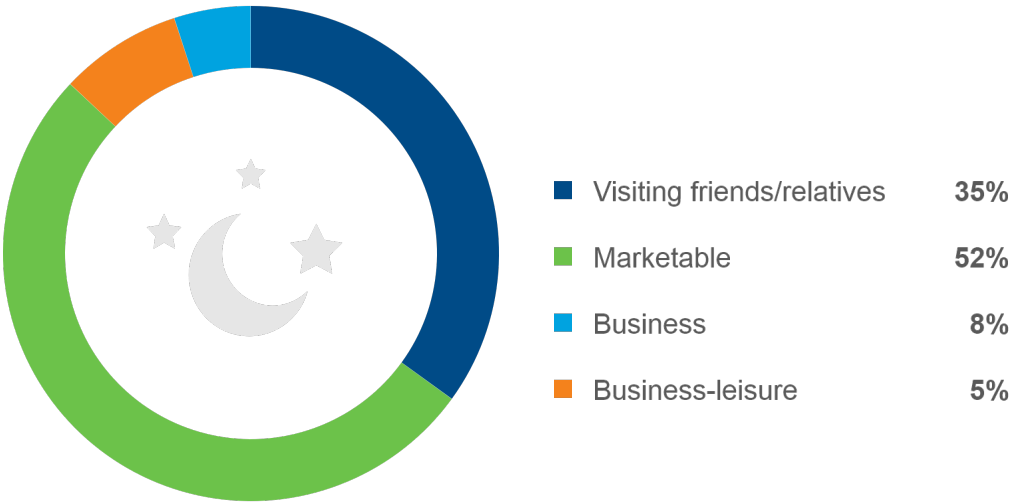
Structure of the U.S. and Scottsdale Overnight Travel Market

Base: 2020 Overnight Person-Trips

2020 U.S. Overnight Trips

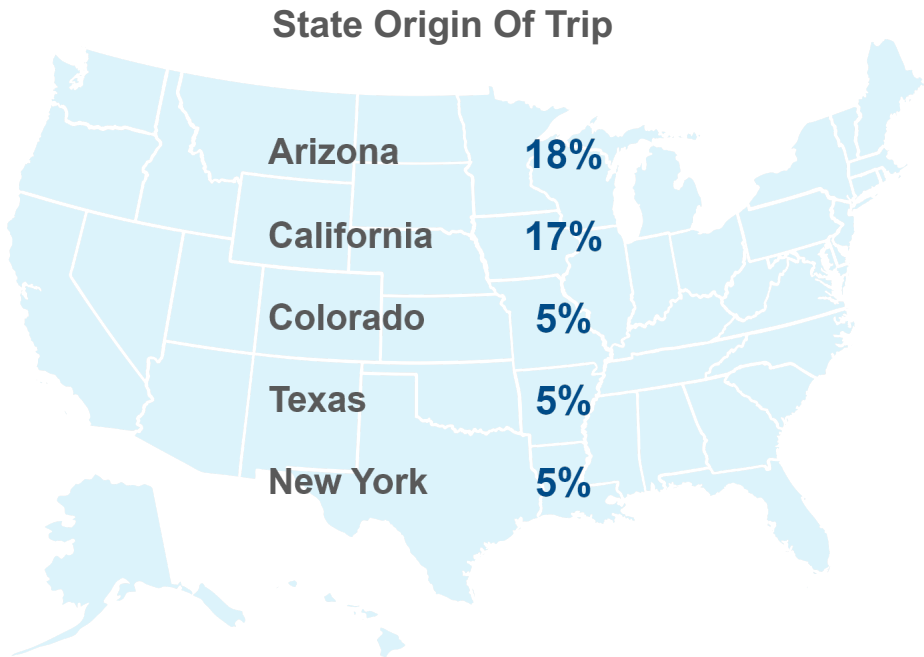


2020 Scottsdale Overnight Trips

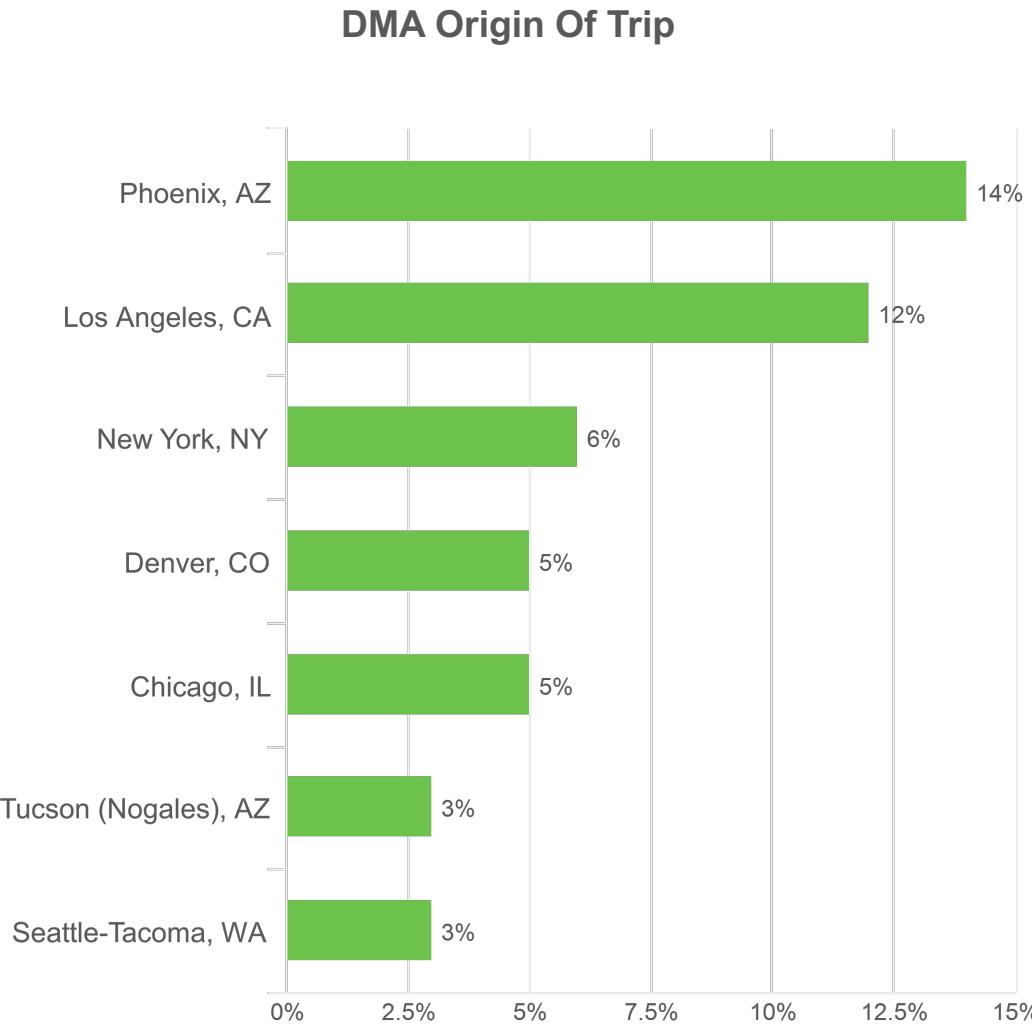


Scottsdale's Overnight Trip Characteristics

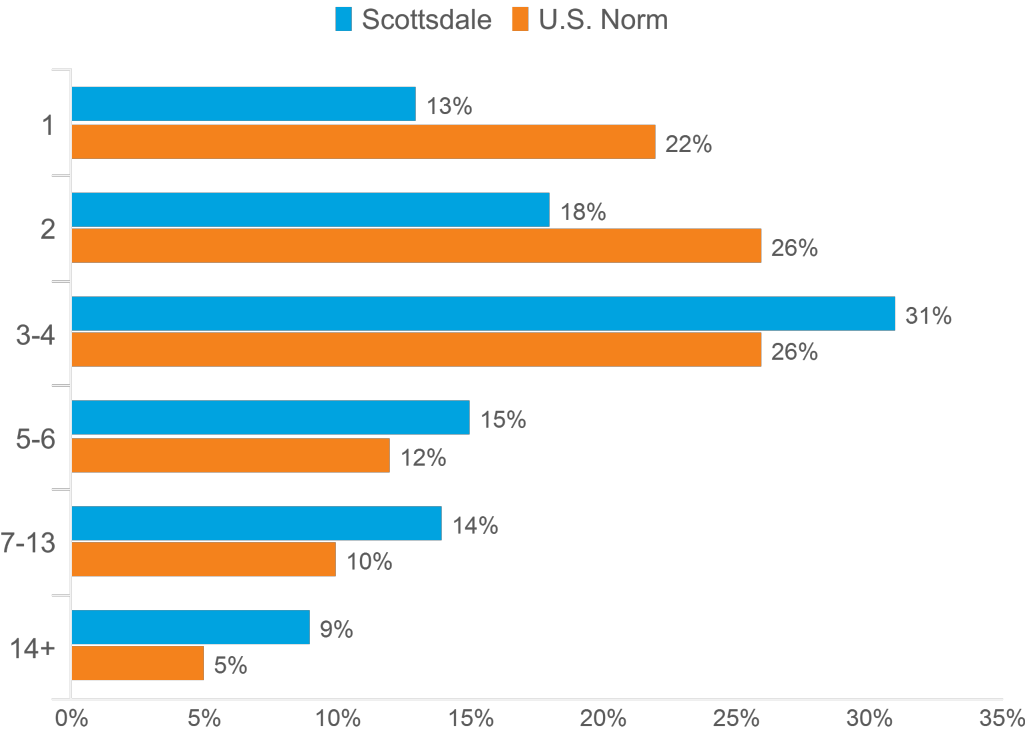
Base: 2020 Overnight Person-Trips



Season of Trip
Total Overnight Person-Trips



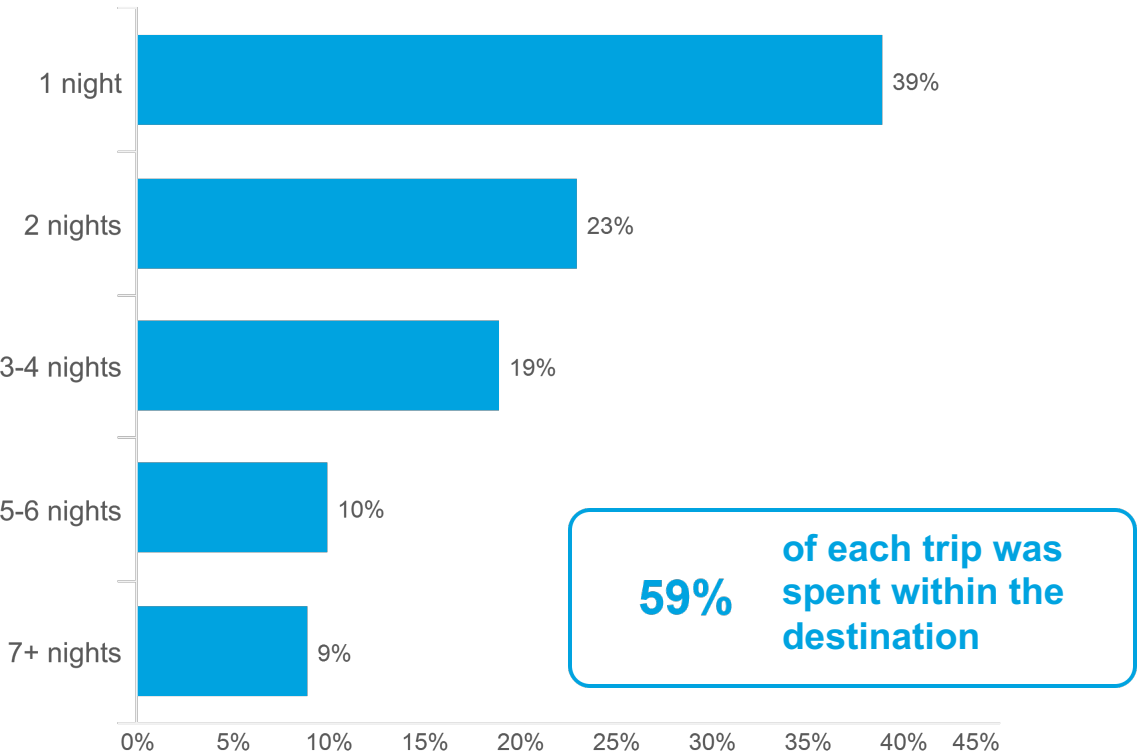
Total Nights Away on Trip



Scottsdale
5.5
Average Nights

U.S. Norm
4.1
Average Nights

Nights Spent in Scottsdale



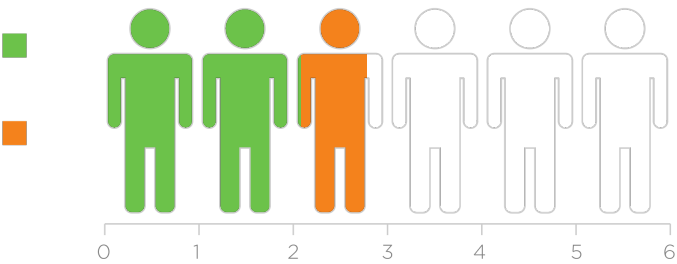
Average number of nights
3.3

Average last year
3.5

Size of Travel Party

■ Adults ■ Children

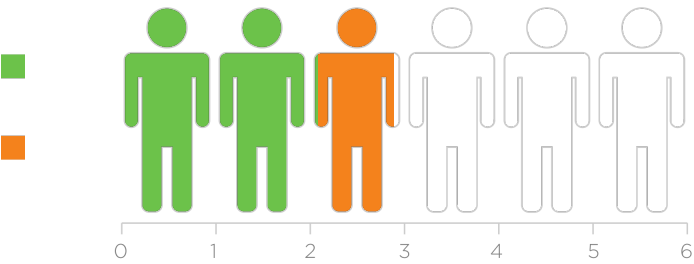
Scottsdale



Average number of people

Total
3.0

U.S. Norm

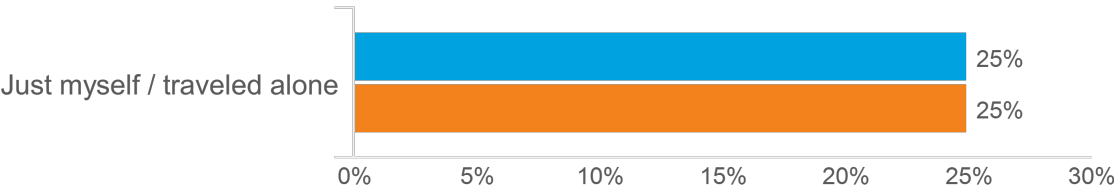


Average number of people

Total
3.0

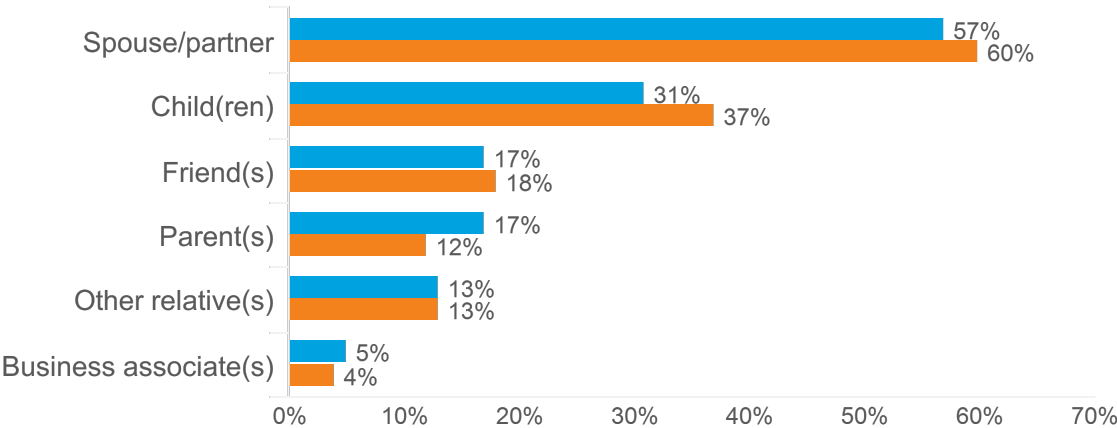
Percent Who Traveled Alone

■ Scottsdale ■ U.S. Norm



Composition of Immediate Travel Party

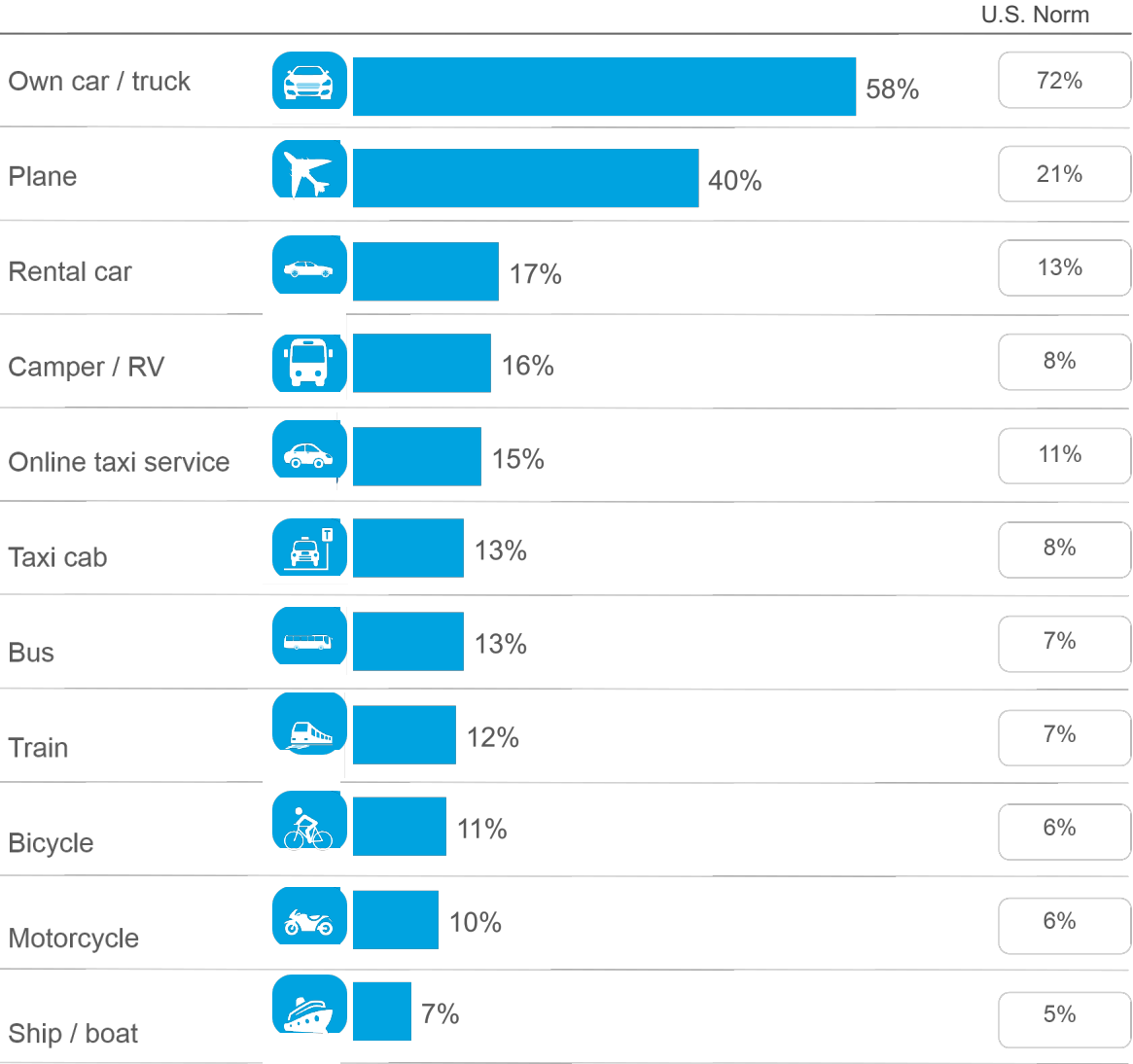
■ Scottsdale ■ U.S. Norm



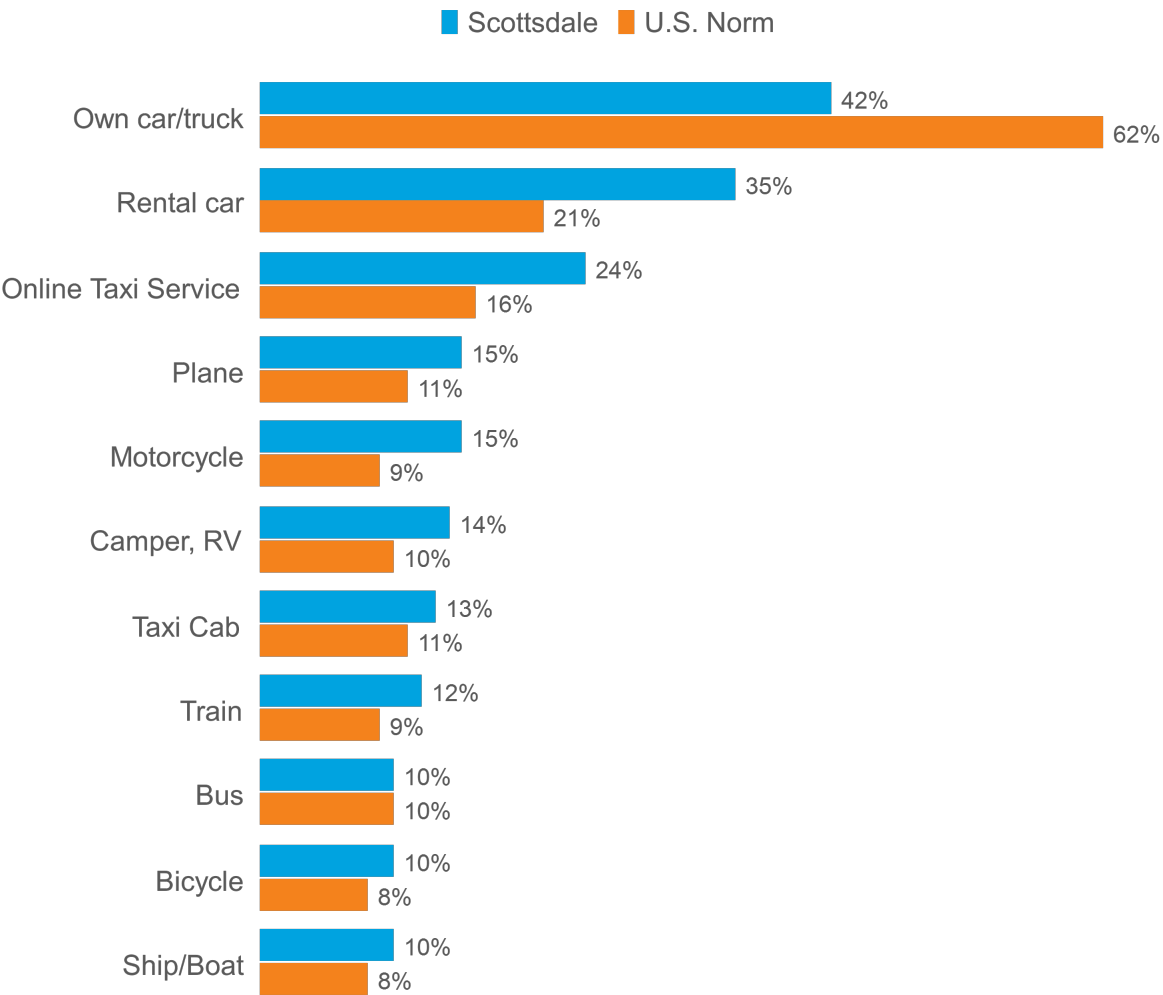
Scottsdale's Overnight Trip Characteristics

Base: 2020 Overnight Person-Trips

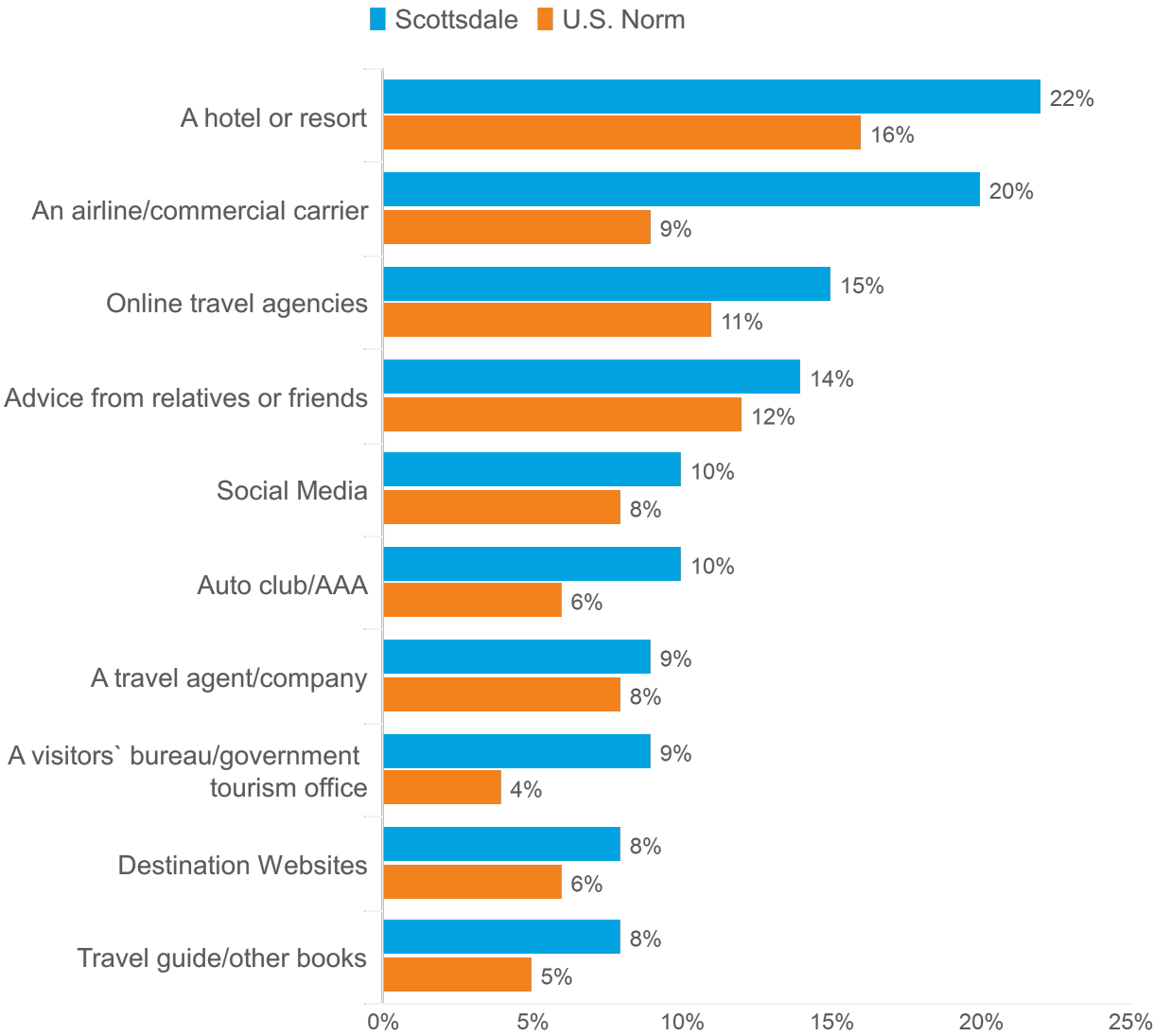
Transportation Used to get to Destination



Transportation Used within Destination



Trip Planning Information Sources



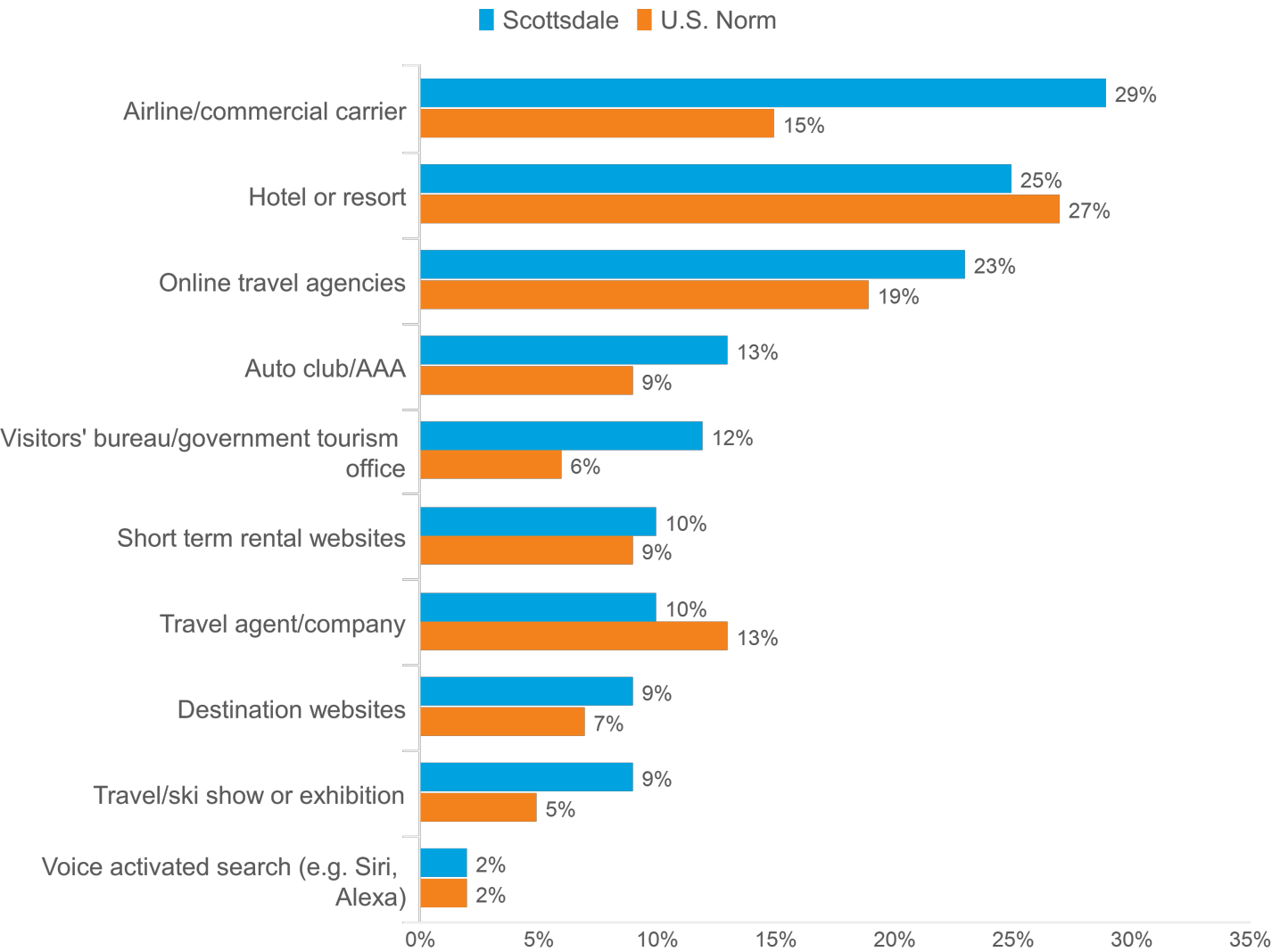
Length of Trip Planning

	Scottsdale	U.S. Norm
1 month or less	28%	33%
2 months	18%	15%
3-5 months	21%	15%
6-12 months	16%	11%
More than 1 year in advance	4%	4%
Did not plan anything in advance	13%	21%








Scottsdale's Overnight Trip Characteristics

Base: 2020 Overnight Person-Trips

Method of Booking



Accommodations

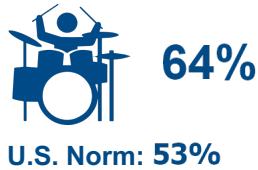
		Scottsdale	U.S. Norm
	Hotel	36%	36%
	Resort hotel	18%	10%
	Home of friends / relatives	16%	22%
	Motel	12%	12%
	Bed & breakfast	11%	7%
	Rented home / condo / apartment	11%	6%
	Time share	10%	4%

Activity Groupings

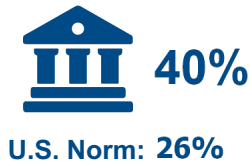
Outdoor Activities



Entertainment Activities



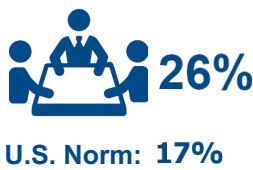
Cultural Activities



Sporting Activities









Business Activities



Activities and Experiences (Top 10)







	Scottsdale	U.S. Norm
Shopping	27%	22%
Sightseeing	19%	16%
Hiking/backpacking	16%	9%
Attending celebration	16%	13%
Bar/nightclub	15%	11%
Casino	15%	10%
Business convention/conference	14%	7%
Swimming	14%	12%
Landmark/historic site	14%	11%
Business meeting	13%	9%

Shopping Types on Trip

		Scottsdale	U.S. Norm
	Outlet/mall shopping	49%	49%
	Convenience/grocery shopping	45%	43%
	Big box stores (Walmart, Costco)	39%	36%
	Souvenir shopping	37%	37%
	Boutique shopping	29%	26%
	Antiquing	13%	12%

Base: 2020 Overnight Person-Trips that included Shopping

Dining Types on Trip

		Scottsdale	U.S. Norm
	Unique/local food	46%	40%
	Fine/upscale dining	27%	20%
	Food delivery service (UberEATS, DoorDash, etc.)	26%	20%
	Street food/food trucks	19%	19%
	Picnicking	16%	13%
	Gastropubs	14%	8%



60%
of overnight travelers were
very satisfied with their overall
trip experience



Quality of accommodations



Cleanliness



Quality of food



Safety/security



Friendliness of people



Sightseeing/attractions



Music/nightlife/entertainment



Public transportation



Value for money

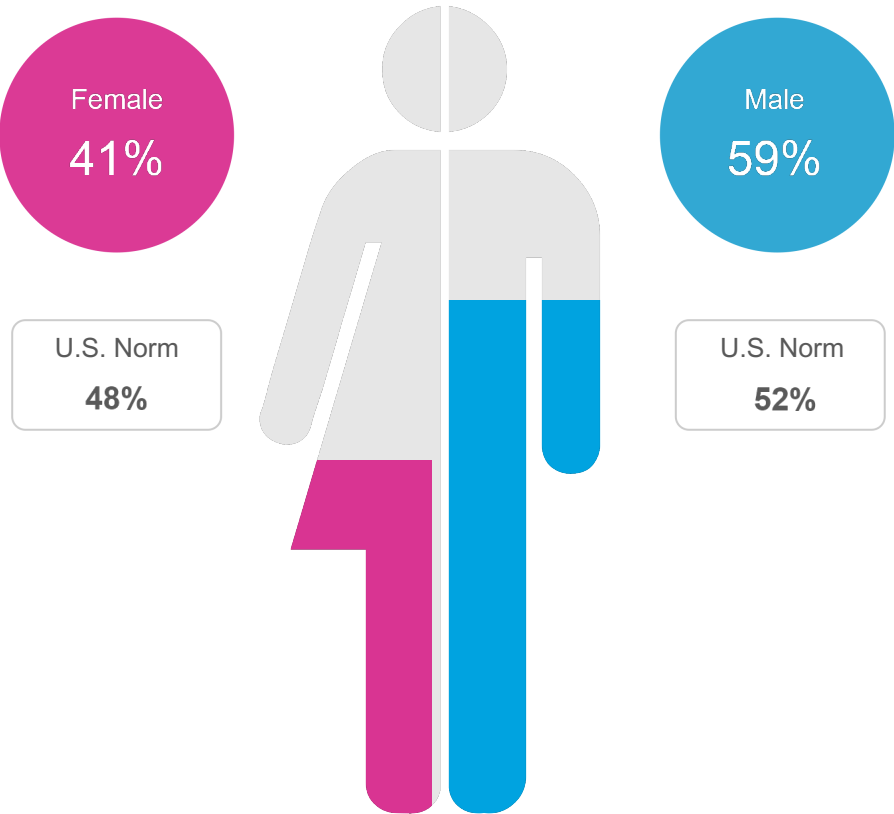


0% 10% 20% 30% 40% 50% 60% 70%

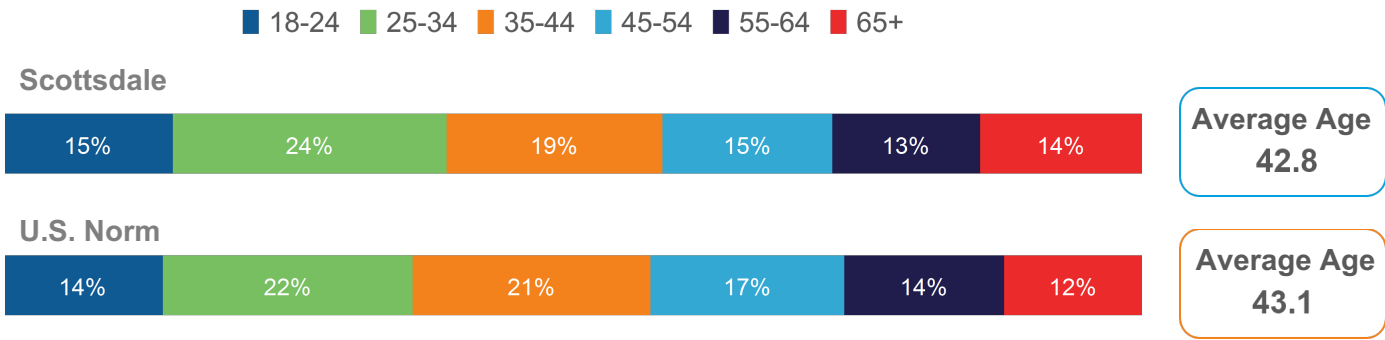
Demographic Profile of Overnight Scottsdale Visitors

Base: 2020 Overnight Person-Trips

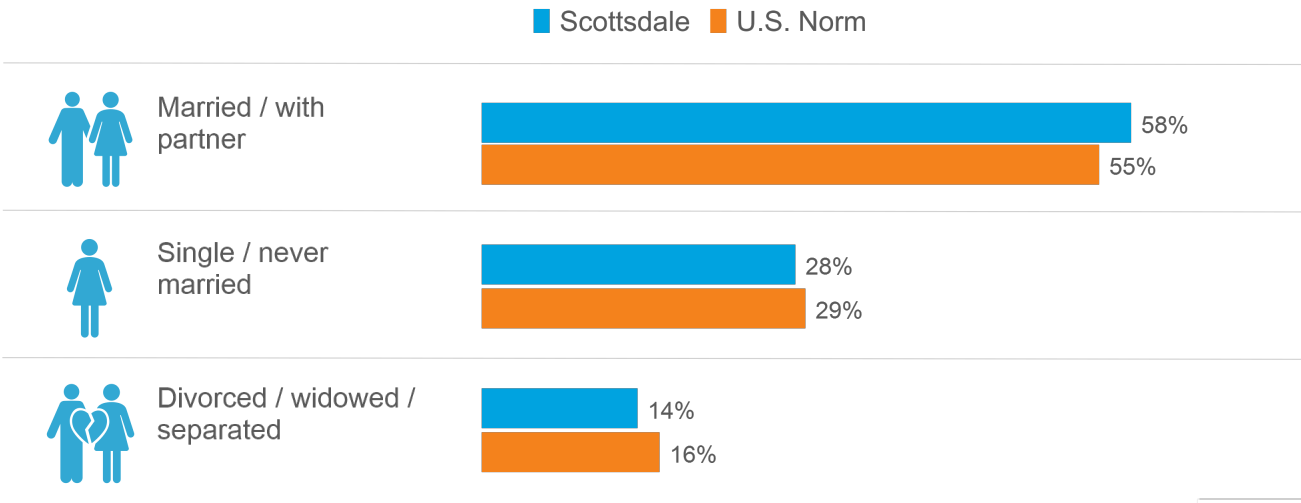
Gender



Age



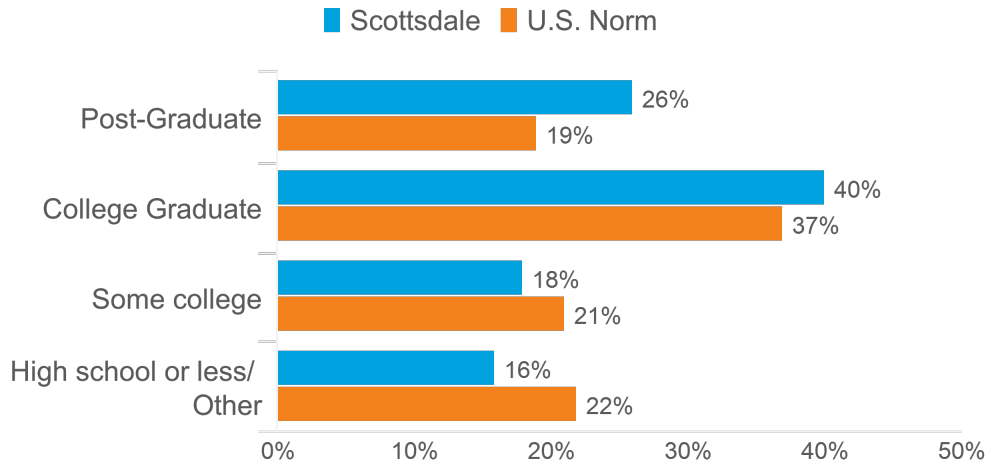
Marital Status



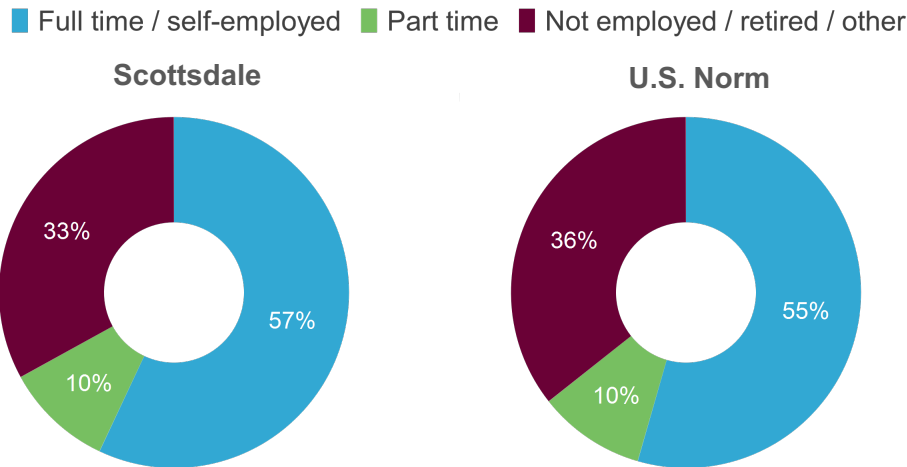
Demographic Profile of Overnight Scottsdale Visitors

Base: 2020 Overnight Person-Trips

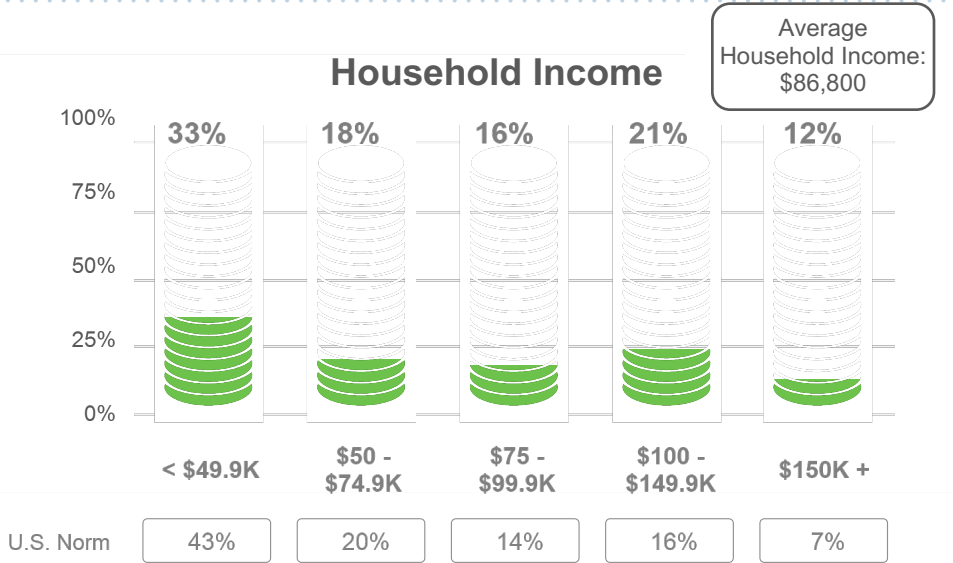
Education



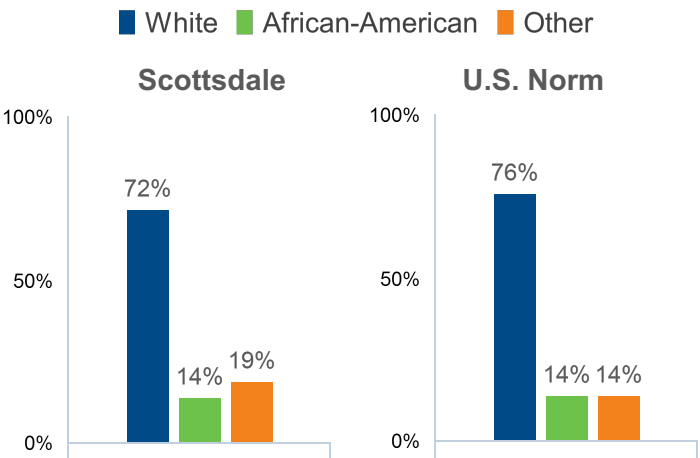
Employment



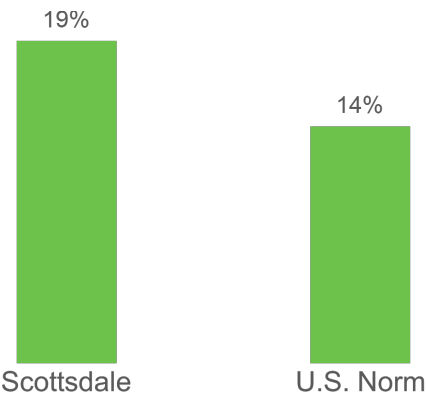
Household Income



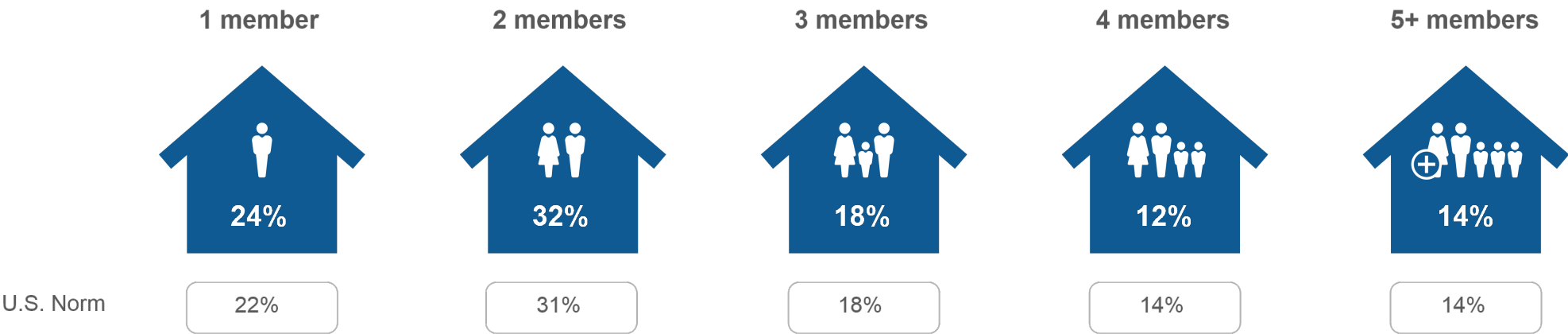
Race



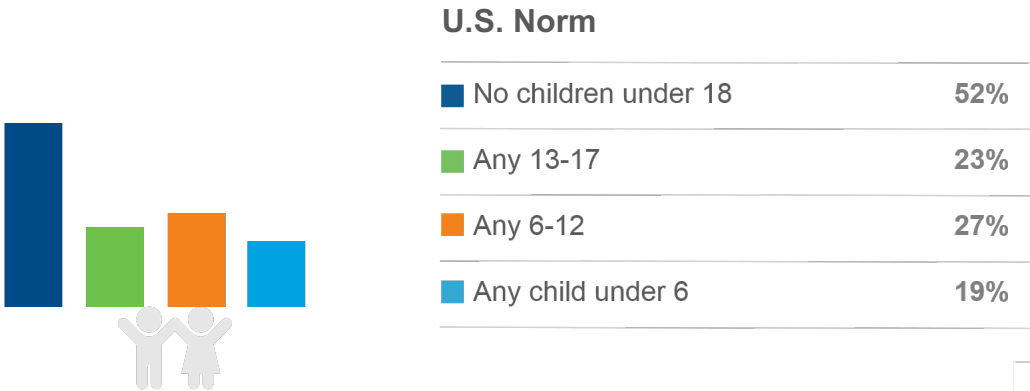
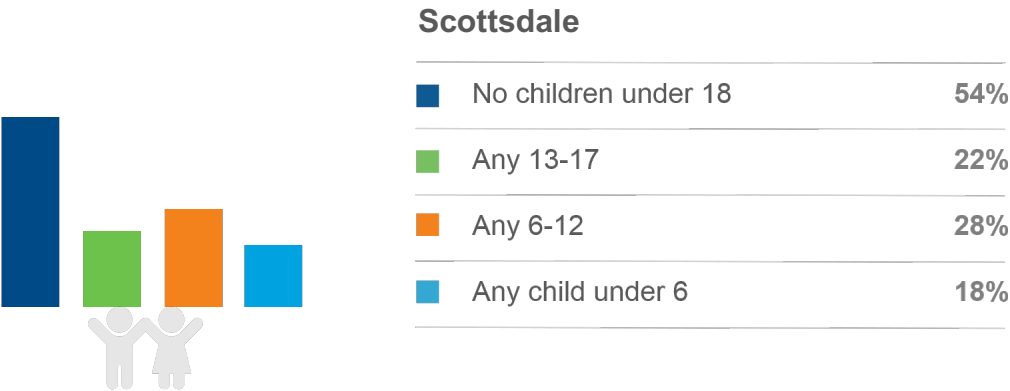
Hispanic Background



Household Size



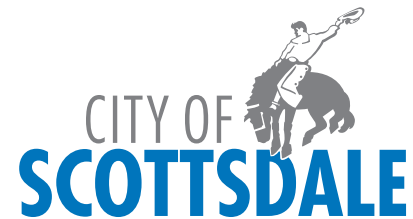
Children in Household



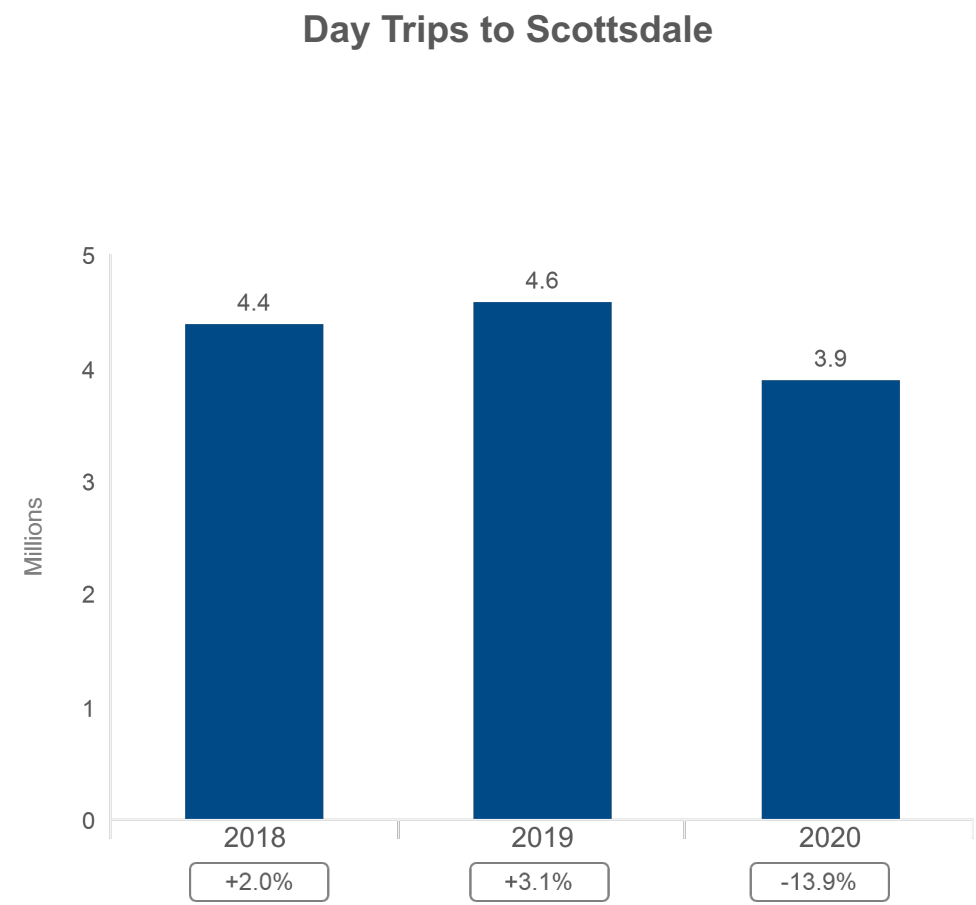


Travel USA Visitor Profile

Day Visitation



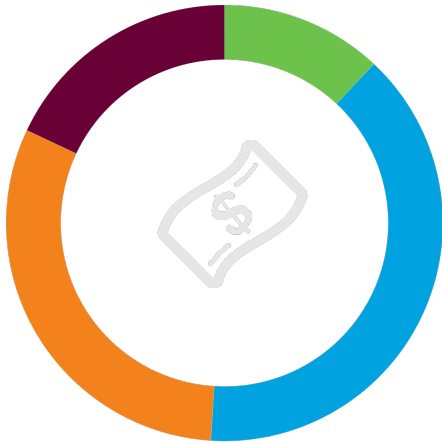
2020



Domestic Day Expenditures - by Sector

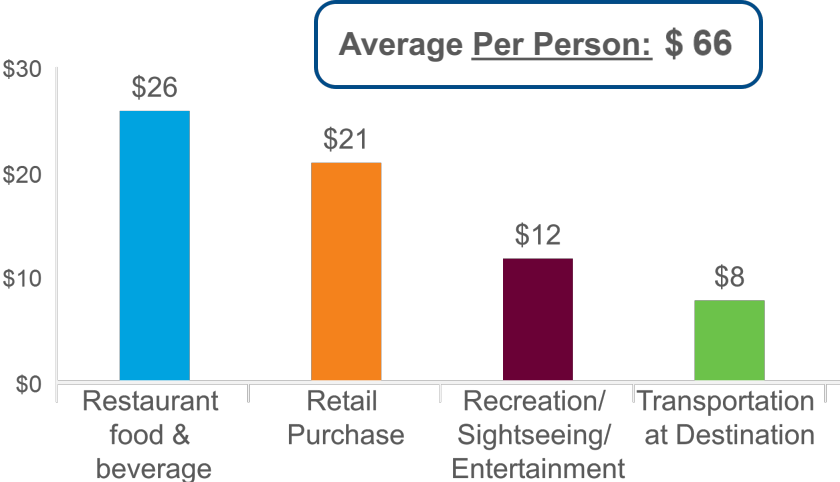
Total Spending
\$ 0.263 Billion

-22.2% vs. last year



- Transportation at Destination -5.1% v. 2019
12% \$33 Million
- Restaurant Food & Beverage -28.4% v. 2019
39% \$103 Million
- Retail Purchase -15.6% v. 2019
31% \$81 Million
- Recreation/Entertainment -27.2% v. 2019
18% \$46 Million

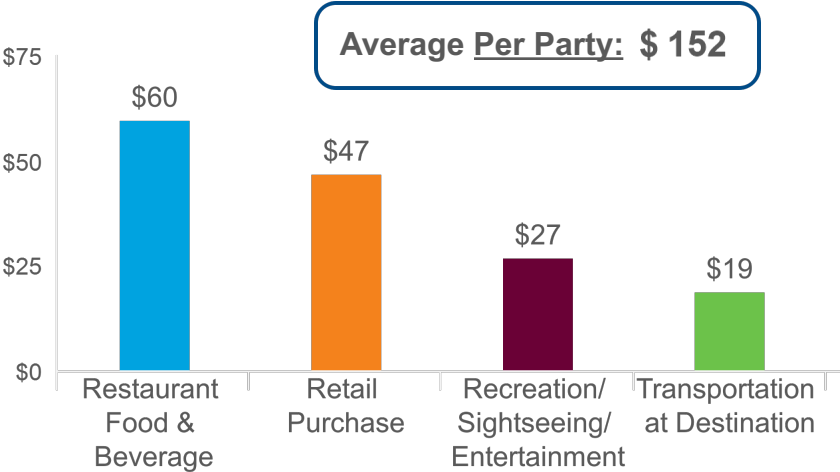
Average Per Person Expenditures on Domestic Day Trips - by Sector



Average Per Person: \$ 66

Average Per Person:
Leisure \$65

Average Per Party Expenditures on Domestic Day Trips - by Sector



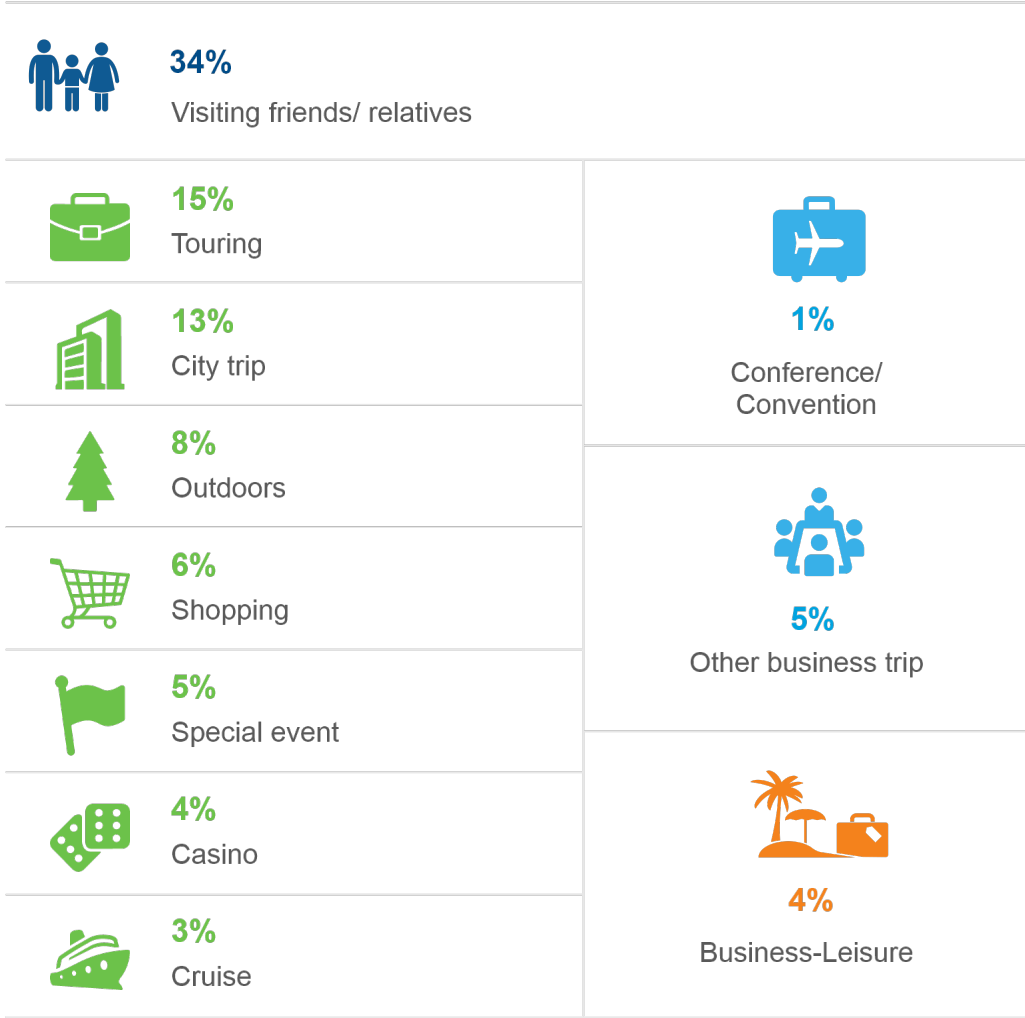
Average Per Party: \$ 152

Average Per Party:
Leisure \$153

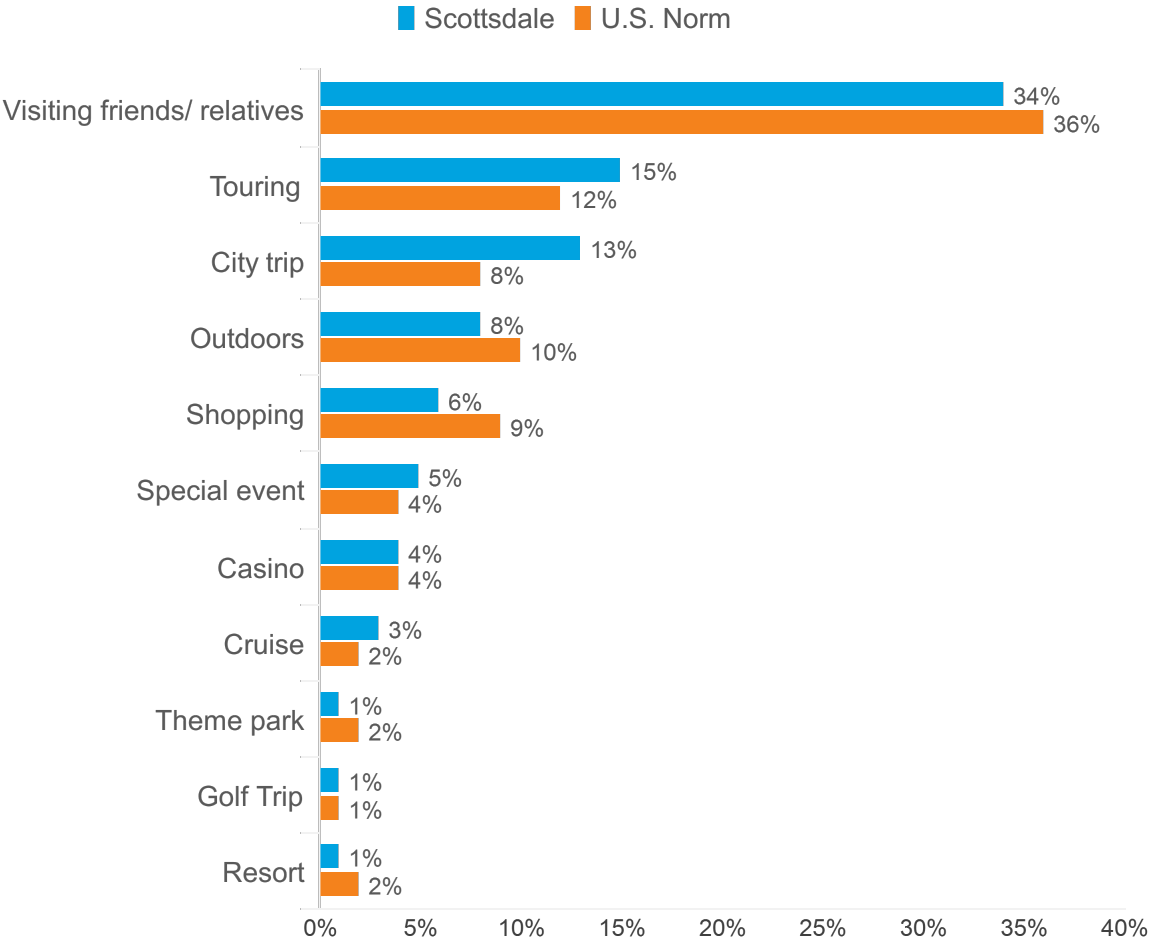
Scottsdale's Day Trip Characteristics

Base: 2020 Day Person-Trips

Main Purpose of Trip



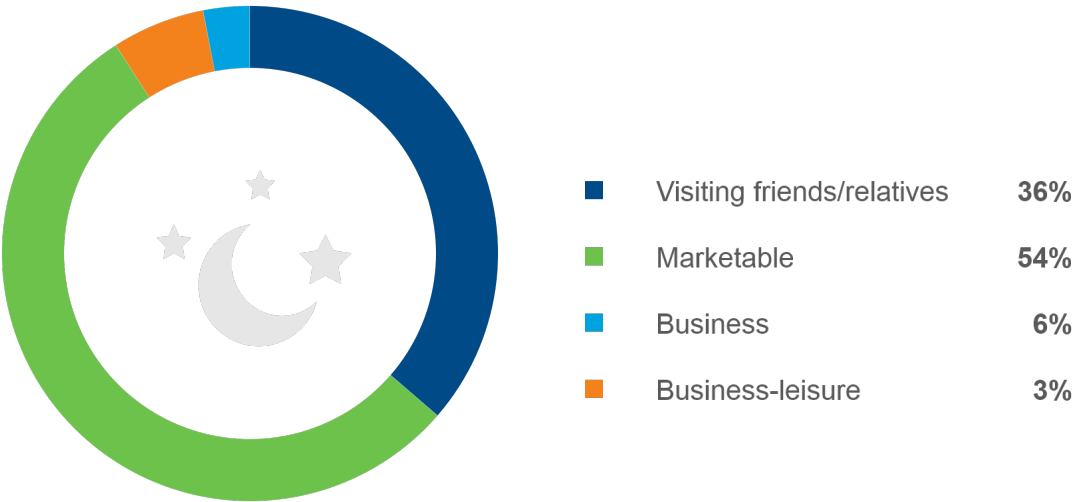
Main Purpose of Leisure Trip



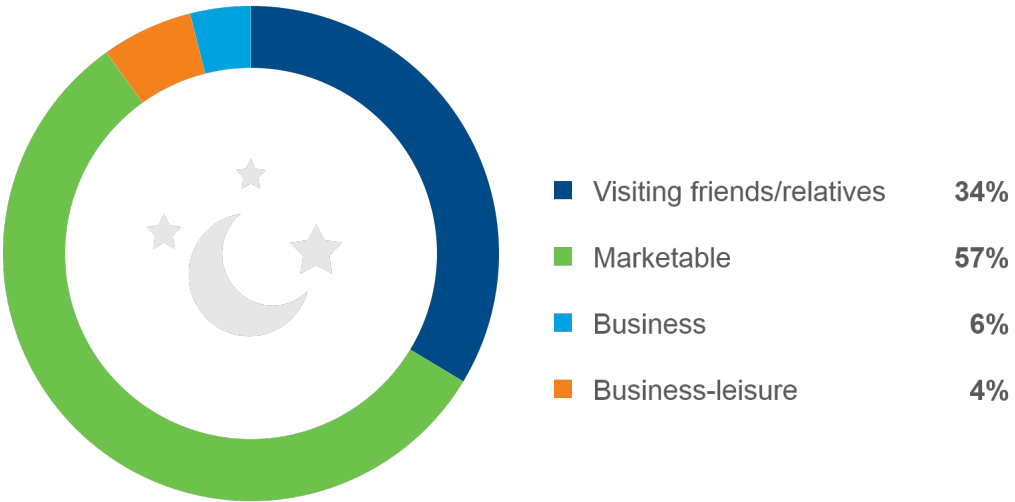
Structure of the U.S. and Scottsdale Day Travel Market

Base: 2020 Day Person-Trips

2020 U.S. Day Trips

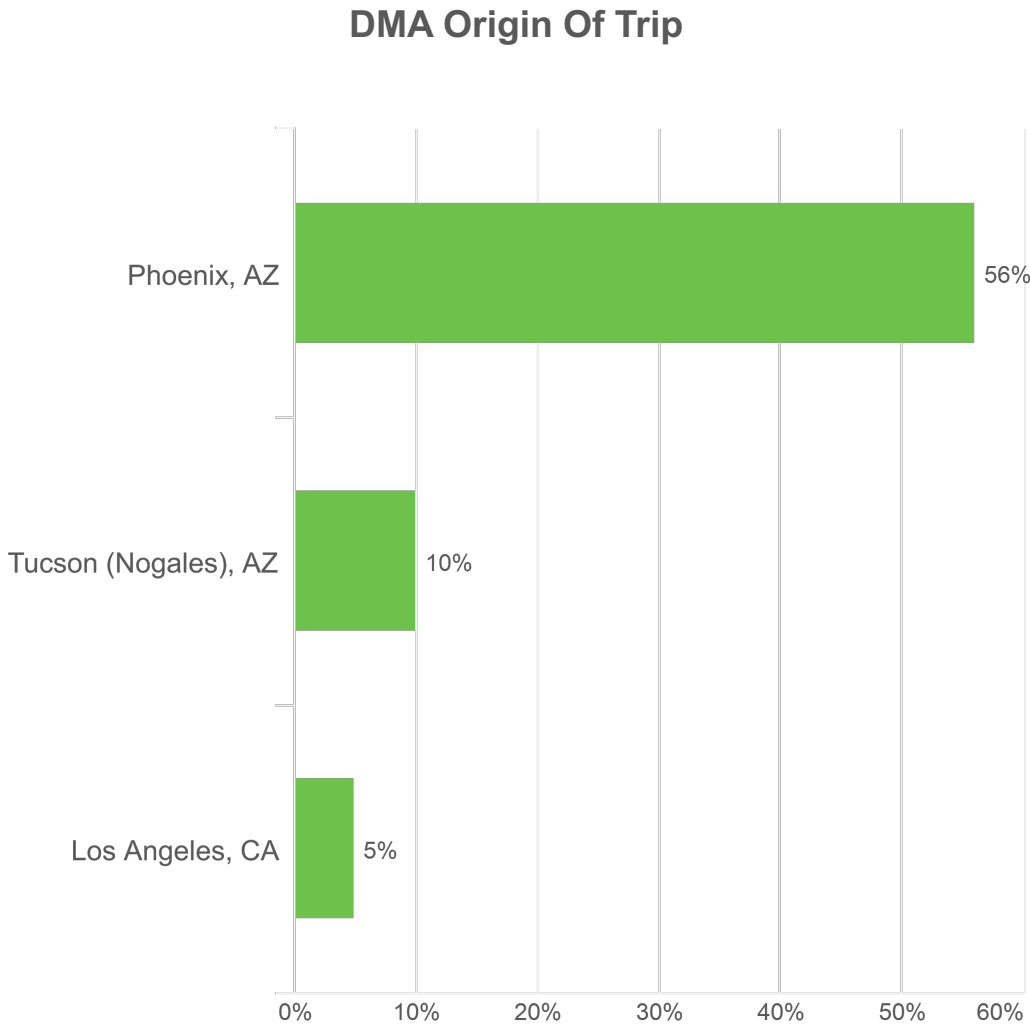
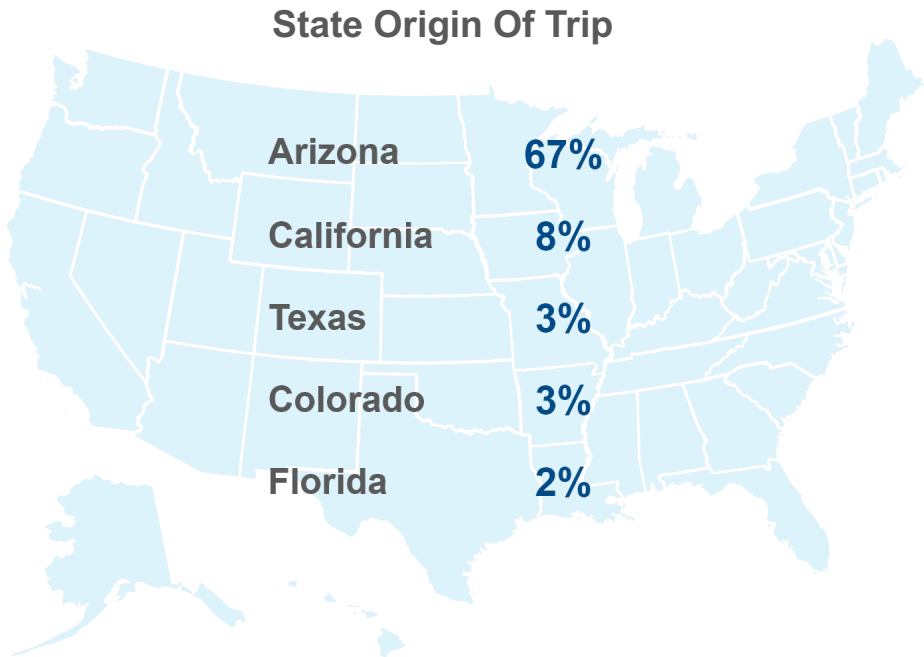


2020 Scottsdale Day Trips



Scottsdale's Day Trip Characteristics

Base: 2020 Day Person-Trips

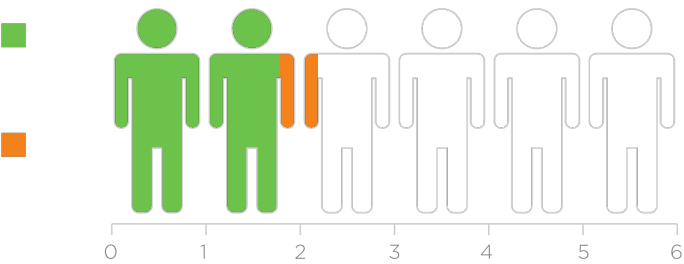


Season of Trip
Total Day Person-Trips

Size of Travel Party

■ Adults ■ Children

Scottsdale

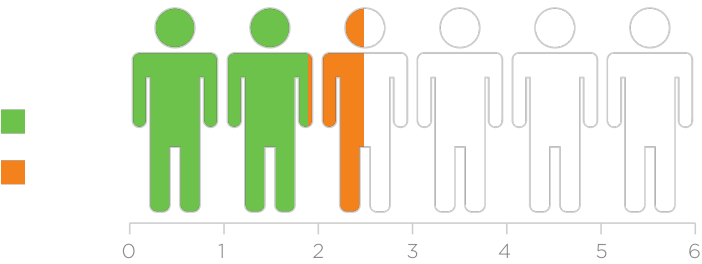


Average number of people

Total

2.3

U.S. Norm



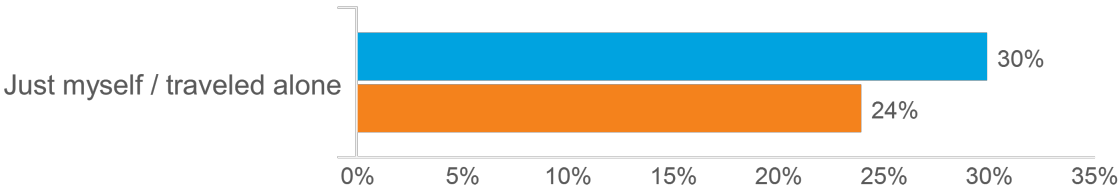
Average number of people

Total

2.6

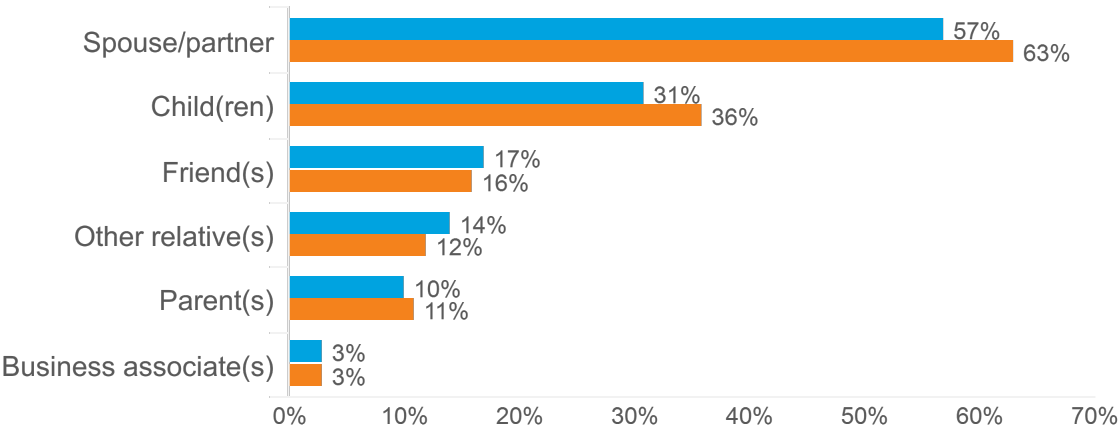
Percent Who Traveled Alone

■ Scottsdale ■ U.S. Norm



Composition of Immediate Travel Party

■ Scottsdale ■ U.S. Norm

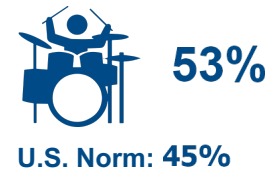


Activity Groupings

Outdoor Activities



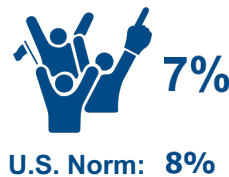
Entertainment Activities



Cultural Activities




Sporting Activities



Business Activities



Activities and Experiences (Top 10)







	Scottsdale	U.S. Norm
	Shopping	25%
	Sightseeing	17%
	Casino	13%
	Hiking/backpacking	10%
	Business meeting	9%
	Landmark/historic site	8%
	Local parks/playgrounds	8%
	Swimming	8%
	Zoo	8%
	Attending celebration	7%

Shopping Types on Trip

		Scottsdale	U.S. Norm
	Outlet/mall shopping	60%	49%
	Boutique shopping	38%	21%
	Big box stores (Walmart, Costco)	33%	31%
	Convenience/grocery shopping	23%	28%
	Antiquing	18%	12%
	Souvenir shopping	18%	20%

Base: 2020 Day Person-Trips that included Shopping

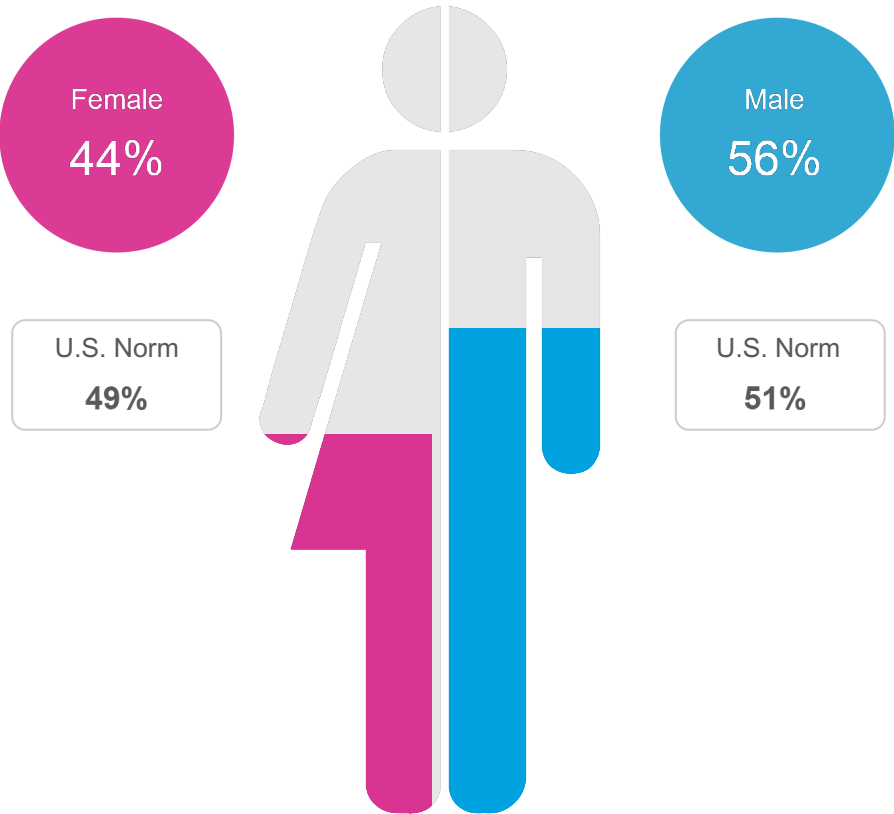
Dining Types on Trip

		Scottsdale	U.S. Norm
	Unique/local food	40%	34%
	Fine/upscale dining	21%	12%
	Street food/food trucks	20%	15%
	Food delivery service (UberEATS, DoorDash, etc.)	17%	12%
	Picnicking	15%	14%
	Gastropubs	7%	5%

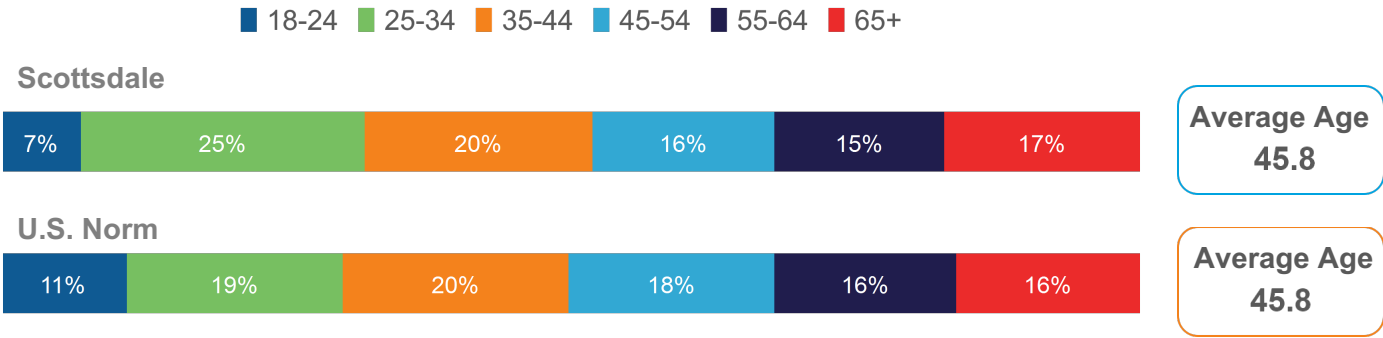
Demographic Profile of Day Scottsdale Visitors

Base: 2020 Day Person-Trips

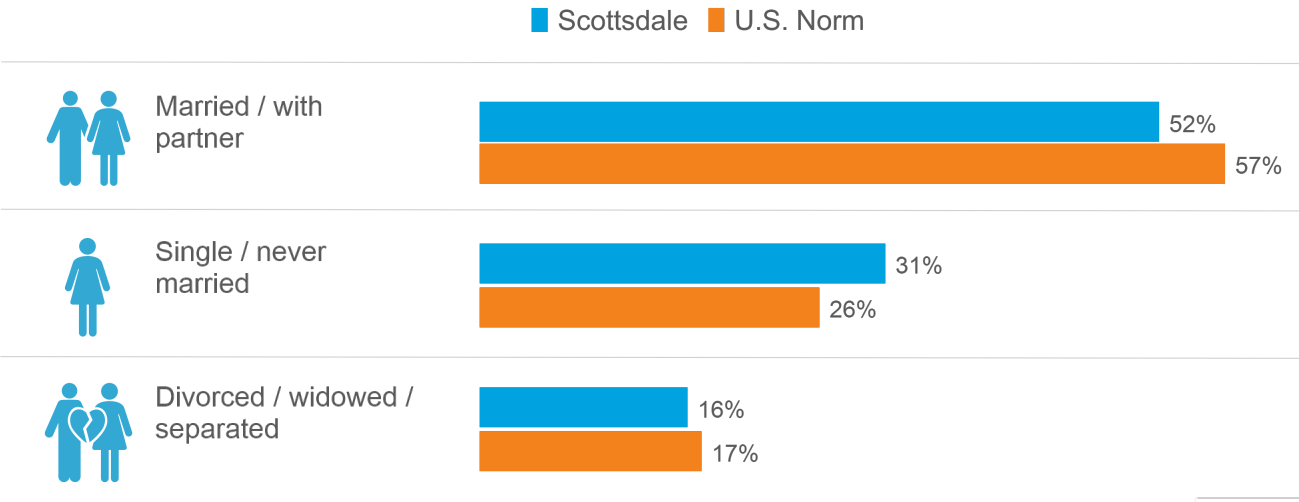
Gender



Age



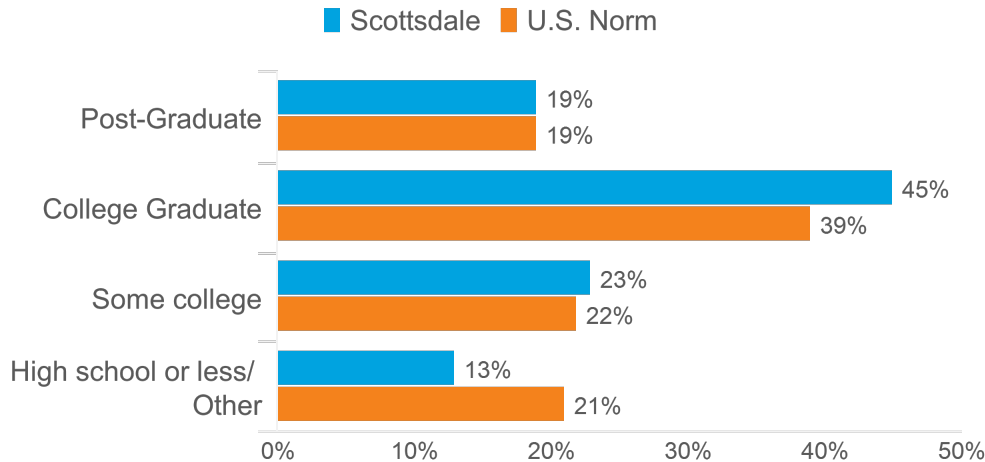
Marital Status



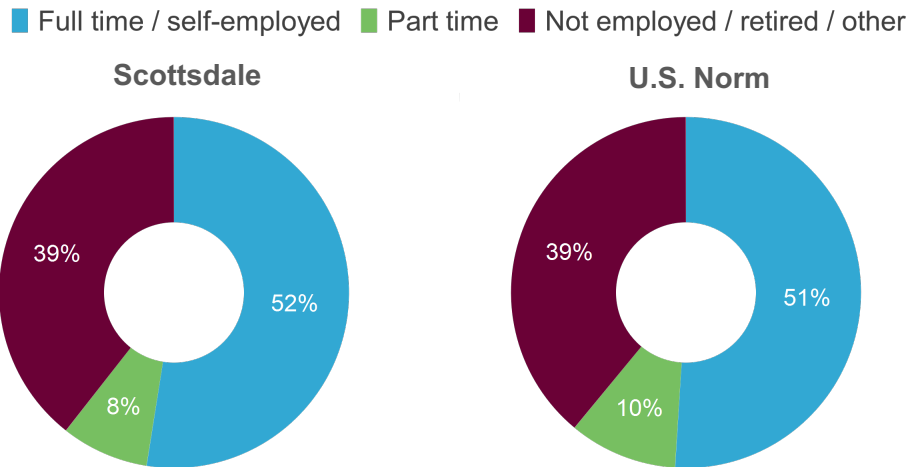
Demographic Profile of Day Scottsdale Visitors

Base: 2020 Day Person-Trips

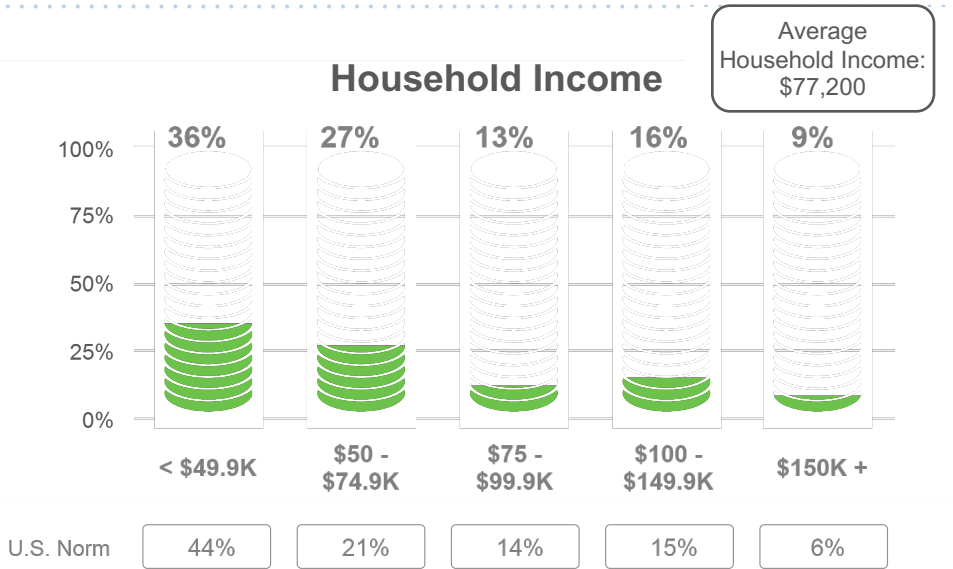
Education



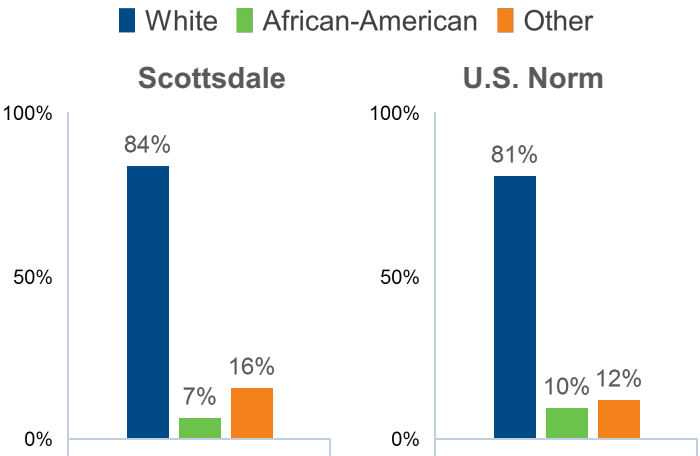
Employment



Household Income



Race



Hispanic Background

